ion Platform
User Manual

Your Guide to key concepts, navigation and set up

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Introduction

This section introduces you to the ion platform and provides brief orientation of each functional area.

Welcome to ion

The ion platform is a powerful, flexible, cloud-based software that enables you to execute your most sophisticated landing page strategies & tactics. You can access your company's dedicated ion console via a web browser on any computer operating system. You simply log into a secure administration interface to create, test and analyze your landing pages in real-time.

ion is the most advanced landing page platform available. It is for marketers, distributed marketing teams and agencies and is used to create, test and analyze their landing experiences, without needing IT or web developers. Marketers can use ion to:

- Publish stand-alone web experiences such as
  - Landing pages
  - Multi-page experiences like microsites and conversion paths
  - Mobile pages
  - Page parts to be pulled into other pages, like forms or graphics
- Go live—launch pages right inside the ion platform
- Add code-free advanced logic and rules to experiences for personalization, segmentation and targeting
- Launch A/B and multivariate tests to optimize for higher conversion rates
- Track & analyze results for strategic insights

This manual will provide an introduction to key concepts for using your ion console. Complete instructions for using the ion platform features, advanced help content, and 'how to' articles can be found in the ion support website located at http://support.liveball.com. We encourage you to learn more in the Support site for more information.

In addition, you can request help by sending an email to help@ioninteractive.com to open a support ticket.

You can point domains and subdomains to your dedicated ion IP address. If you have done this, you may also be able to log into your console at the /admin address of those domains. For example, if you point *landing.yourcompany.com* toward your ion console, then you may be able to access your console at *landing.yourcompany.com/admin*

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How to Access your ion Console

Your organization has a dedicated ion console that you can access and use via any web browser. You won't need any special browser plugins or downloads, and can fully use browser versions of Safari, Chrome, Firefox and IE (dating back 1 version from the most current).

You can log into your ion console at *yourcompany.postclickmarketing.com/admin* (where "your company" is replaced with your actual unique company name).

Orientation

Before you get started, take a moment to review these key platform concepts for organization, publishing, tracking conversions, going live and more.

Organization

Your console is organized in a series of 'folders.' Portfolios are the highest level folders. Within portfolios are sub-folders for campaigns. Campaigns contain creatives, URLS and tests. You can add as many portfolios, campaigns, and creatives as you wish.

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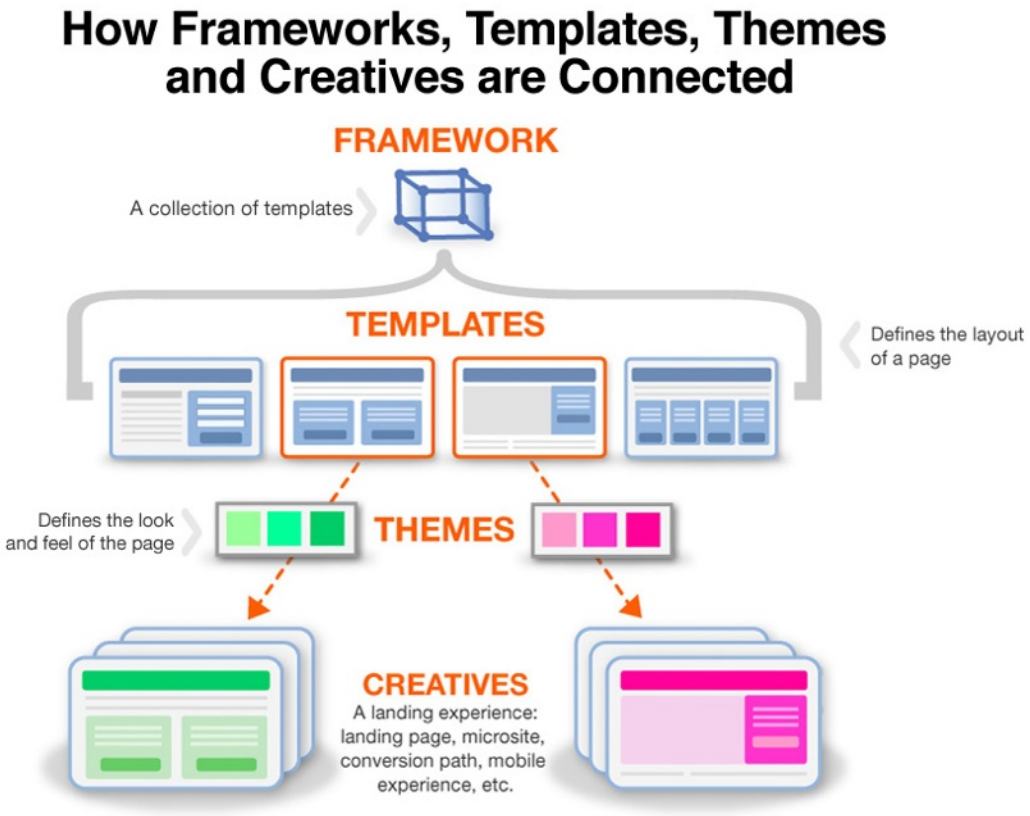
Templates

In the ion platform, you publish pages and experiences using templates (called "Master Pages"). The platform comes with a set of templates that are custom-branded based on your brand guidelines. You can also make your own templates using HTML, or have the ion team create custom templates for you as a special project.

The benefit of templates is marketer freedom. A designer can create a page layout once and then the marketer can use it, over and over again, changing it, updating it whenever they need to—creating hundreds, or even thousands, of versions of the page without ever having to use technical or design resources.

With drag & drop functionality, ion's templates provide flexibility and agility to modify templates on the fly and fit them to your page layout needs.

This graphic helps demonstrate the relationship between ion frameworks, templates, themes and creatives.


How Frameworks, Templates, Themes and Creatives are Connected
FRAMEWORK
A collection of templates
TEMPLATES
Defines the layout of a page
Defines the look and feel of the page
THEMES
CREATIVES
A landing experience: landing page, microsite, conversion path, mobile experience, etc.

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Tracking Conversions

A conversion is the ultimate action you want a web visitor to take. For example, if you want visitors to fill out a form, that action would be your conversion. If you want a visitor to buy something online, that would be your conversion.

The ion platform provides the ability to track and optimize form eCommerce conversions as well as other actions you determine to be conversions (like completing an online application or registering for a webinar). If the conversion occurs on pages you create in the ion platform, you can easily flag the conversion for tracking and optimizing with a simple checkbox. If a conversion happens outside of your ion pages after the visitor has left the ion page and moved into your site conversion funnel, you can easily track and optimize this through a platform tracking code that we will provide you to place on your pages.

Going Live

Going live only takes a second and requires no IT resources - you can do it yourself! Once you have finalized a creative, you go live by creating a traffic source URL. Use these URLs in your PPC ads, email blasts, social marketing campaigns and anywhere else where you would like to drive traffic into your ion creative(s).

Testing

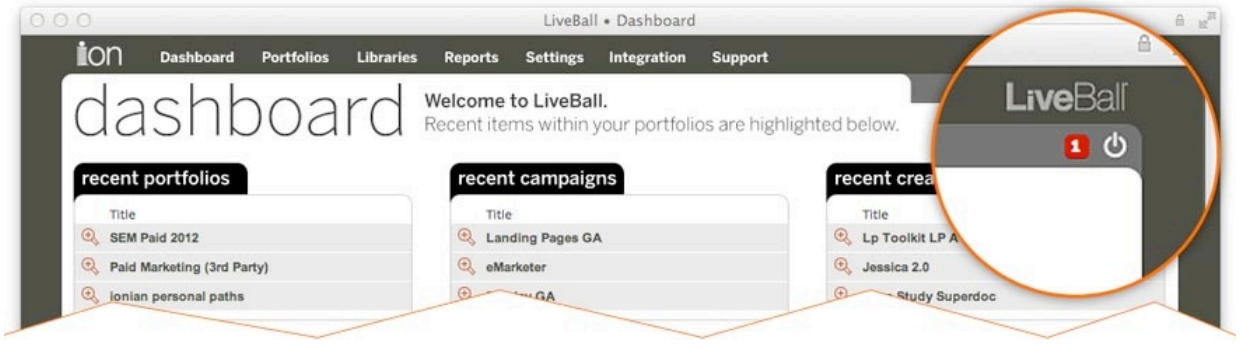
You can test different creatives against each other to determine which converts better by adding additional creatives to your traffic source(s). You can also test different elements on a page to identify content variables that positively influence conversion with the platform's built in multivariate functionality accessed at the page level.

Reporting

Once you are receiving traffic and testing creatives or variables, you can review a number of different reporting features and view metrics on your visitors! You can use either one of your Performance tabs or run an actual report to see where your respondents are clicking, what pages they are viewing, where they are coming from, how long they are viewing those pages and much more. You can even automate your reports to be sent to your inbox on a regular basis.

Navigating around the ion Platform

When you log into your ion console, you will be on the Dashboard. From the dashboard you can quickly access your most recent portfolios, campaigns and creatives, as well as navigate the global menu. This section will explain what lives where in ion and how to find global platform features.



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The Dashboard

Just under the ion logo in the right corner, you might see a red number when you log in. Any notifications, such as reaching statistical significance on an active test, will be here. Remember to check your alerts each time you log in.

> If you log into your console and you have not yet sent any traffic to your ion pages, the areas of the Dashboard will be blank. When you start sending traffic to your pages, these areas will populate with data.

At the top of your dashboard are your three most recently used portfolios, campaigns and creatives. To navigate into your most recently used portfolios, campaigns or creatives, click the corresponding magnifying glass next to the item.

Below your recent areas are three gauges that relate to your console's overall performance. On the left side is your capacity gauge. Your capacity gauge displays how many respondents are being stored in your console in relation to the maximum storage per your ion subscription agreement.

> Your ion "capacity" and monthly traffic tier is part of your subscription to ion. These concepts are described in more detail in section 3 of this manual, "Administration & Set up"

In the middle is your respondent funnel. Your respondent funnel displays the total respondents in your console as well as your segmentation and conversion rates. In the ion platform, segmentation measures the level of interactivity between your respondents and your landing pages. A respondent "segments" whenever they land on one of your pages and clicks a tagged element. A conversion occurs whenever a respondent completes the ultimate conversion goal of your landing page.

> In the ion platform a "respondent" is a unique visitor. ion tracks unique visitors to campaigns.

On the right is a traffic flow chart for the previous 30 days. This will give you a quick look at how many respondents have visited your pages in the last 30 days as well as your overall conversion rate for the last 30 days. These are represented by purple and red lines, respectively, in the Traffic Flow chart.

At the bottom of the dashboard screen is a campaign bubble chart. This gauge shows your top ten campaigns over the last fourteen days. Each campaign is represented by a specific color with a key for each on the right. When reviewing your campaign bubble chart, the larger the bubble, the more traffic that is associated with that campaign. The x-axis measures your segmentation rate and the y-axis measures your conversion rate. We'll explain more about bubble charts in the reporting section of this manual.

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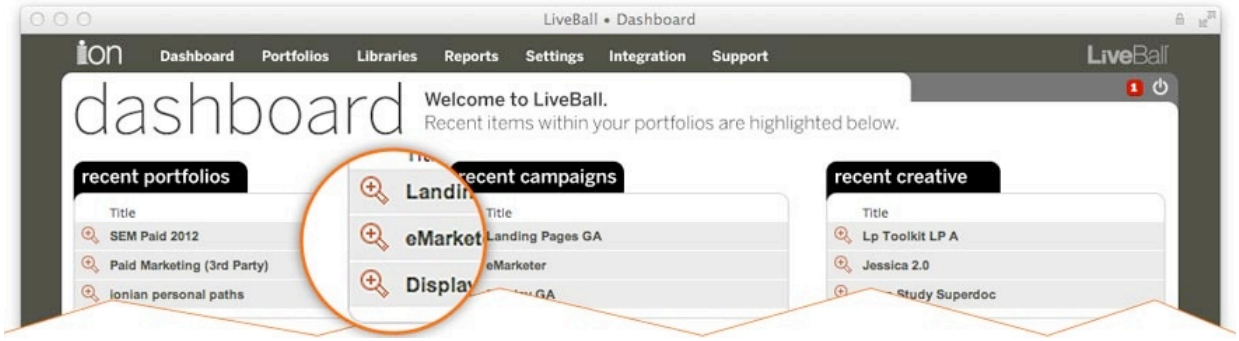
Main Navigation

There are several standard interface elements throughout your console, as well as a consistent navigation menu along the top of the screen. This section explains the interface and navigation of the platform.

When you see the magnifying glass next to anything throughout the ion platform, click the magnifying glass to go into that area.



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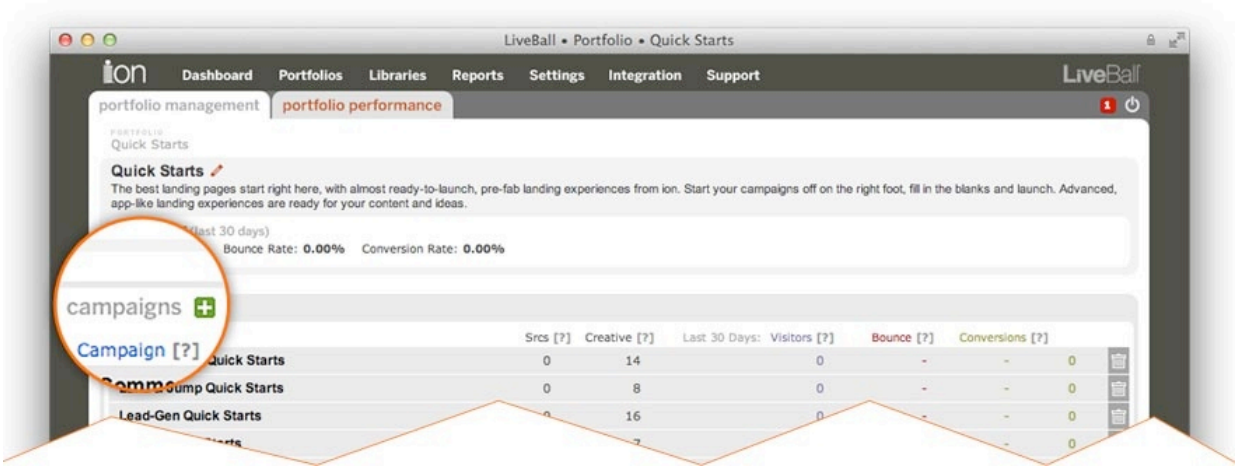
The green plus sign is used to add. For example, if you see a green plus on your portfolio page, you can add a new portfolio. A green plus on your creative management page lets you add a new creative. The green plus is a universal ion sign to add.



On portfolio, campaign, creative and traffic sources list view screens you can click on the column headers, visitors, bounce and conversions to quickly sort in ascending or descending order. We love using this quick feature to help us get to the highest/lowest traffic or highest/lowest converting areas.

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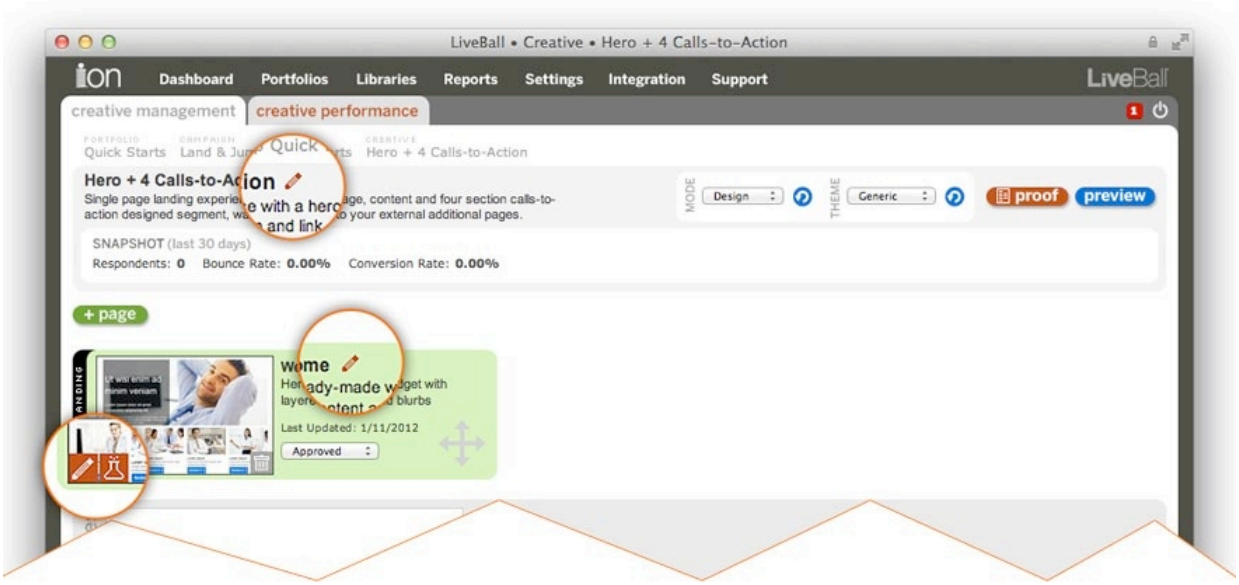
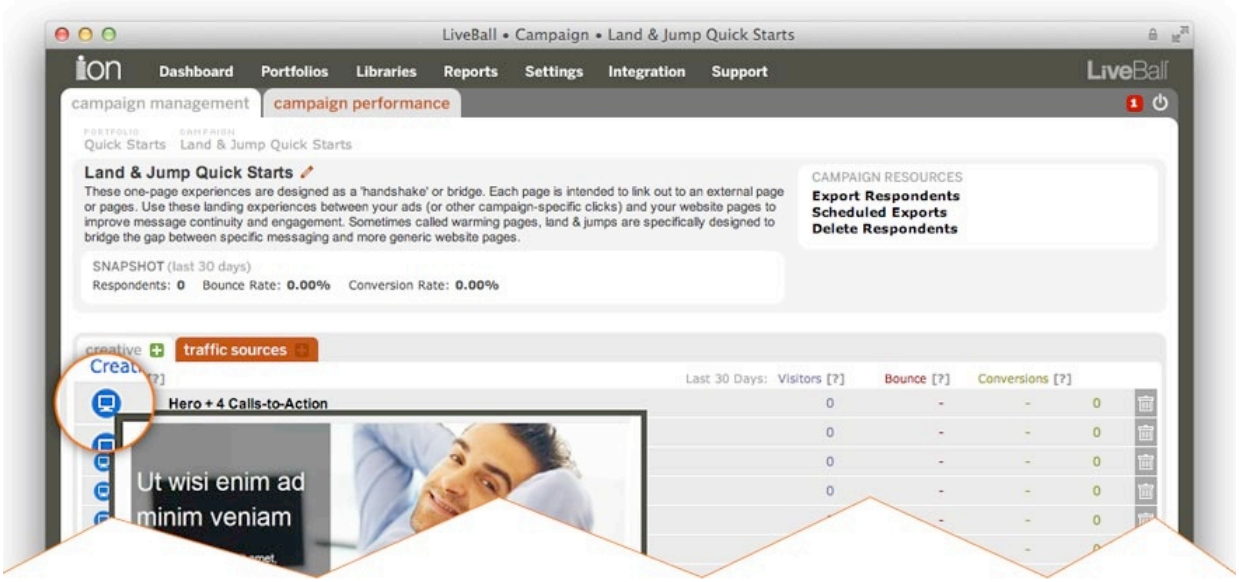
Click the pencil icon to edit any corresponding element.



The blue circle with a screen takes you to "Preview" a creative—this allows you to navigate through a creative the way your visitors will, without impacting your live results. Great for proofing & reviewing.


LiveBall • Campaign • Land & Jump Quick Starts
Dashboard
Portfolios
Libraries
Reports
Settings
Integration
Support
LiveBall
campaign management
campaign performance
Land & Jump Quick Starts
These one-page experiences are designed as a 'handshake' or bridge. Each page is intended to link out to an external page or pages. Use these landing experiences between your ads (or other campaign-specific clicks) and your website pages to improve message continuity and engagement. Sometimes called warming pages, land & jumps are specifically designed to bridge the gap between specific messaging and more generic website pages.
CAMPAIGN RESOURCES
Export Respondents
Scheduled Exports
Delete Respondents
SNAPSHOT (last 30 days)
Respondents: 0 Bounce Rate: 0.00% Conversion Rate: 0.00%
traffic sources
Hero + 4 Calls-to-Action
Ut wisi enim ad
minim veniam

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Across the top of your console you will see the main navigation to access the global, console-wide content and features.

- You can always get back to the dashboard when you click dashboard.
- Portfolios takes you to a list of your portfolios (portfolios are the folders you create to manage your campaigns, creatives and traffic sources).
- Libraries takes you to your global assets that you upload or create in ion. Libraries include centralized storage and management of images, flash files, fulfillment (like whitepapers and downloadable files), forms, email templates (for one to one email, not mass email), scripts, tags, frameworks and widgets. You can also search content here. This is a great feature to help you quickly locate content on your pages and link directly to them to make changes or updates.
- In reports, you can configure PDF or Excel-based reports on-demand or on a regular, scheduled basis. Also, keep in mind your performance tabs for portfolios, campaigns, creatives and traffic sources give you a variety of real-time reporting gauges to help you analyze your landing page performance, user behavior, and much, much more.
- In settings you can change your password, create new admin user accounts (if you are a 'superuser'), manage your storage capacity by deleting old respondent data, configure the domains and subdomains you have pointed to your ion IP address, restrict certain IP addresses (from accessing your pages, being included in your reports, etc), and set up certain console-specific settings such as your testing confidence interval, uploading a favicon, etc.
- In integration you can set up any data fields (including hidden data you may want to collect and track) for your forms and exports, configure batch exports (to salesforce.com, for example), data sources from a lookup table, pick up any external ion conversion or behavioral tracking tags that you may want to install on pages that live outside of ion, and add specialized server scriptlets. You can also search individual or groups of respondents here, which helps you quickly zero in on a particular data record if needed.

Support takes you to our support site where you can get training and “how-to” information on using the ion platform.

As you navigate to portfolios, campaigns, creatives and traffic sources you will notice two tabs just under the main console navigation.

The management tab is where you will actually do things—add portfolios, publishing creatives, etc. To view the performance of that particular section, just click on the Performance tab to access the real-time performance gauges (your specialized ion analytics). For example, when adding a campaign to a portfolio you will be on the portfolio management tab of that portfolio. When you want to view the performance reporting for all the campaigns in that portfolio you will click the portfolio performance tab to see real-time reports.

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Set Up & Administration

Before you begin building landing pages, there are a few things you will likely want to take care of first.

Adding a New User Account

Each user in your organization who uses the ion platform can have their own login account. There are access control options to restrict access to certain features if you prefer to provide your admin users with limited or restricted access. For example, you can restrict an admin user access to only a certain portfolio.

When we create your ion console for you, we will provide the primary 'superuser' account holder from your company with their initial user name and password, which can be changed, based on the user's preference upon login. The 'superuser' can then create user names and passwords for other team members who will be using the ion platform. User seats are unrestricted in ion, so we encourage you to have as many team members trained and working in the ion platform as you wish.

It's easy to create a new manager account. Upon login creation, an email notification will automatically be sent to the new user.

1. To begin, hover over the settings tab and select 'manage accounts'
2. Click '+manager'
3. Enter a manager ID - this is the user's login name (must be unique)
4. Set a password (minimum 6 characters, 1 digit or non-alphanumeric character)
5. Confirm password
6. Enter the user's name
7. Enter the user's email address
8. You can opt to make this manager a "superuser" to give him/her full access to the console
9. Alternatively, you can select the user's feature and portfolio access by checking the boxes that you would like to give that user permission to access
10. Save the manager information
11. Should you decide to edit these settings later, you may always come back and click the pencil icon next to the manager ID you would like to update

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Understanding Console Capacity & Data Storage

ion subscriptions are based on the monthly traffic volume that you send to the pages in your ion console. We have various subscription tiers for traffic volumes—from 10,000 unique visitors per month to 10 million unique visitors per month or more. A unique visitor is a visitor who visits one of your ion traffic source URLs. We don't count repeat visits or page views in your subscription tiers—it's truly unique visitors.

If you ever exceed your subscribed traffic volume in any given month, no problem! You can monitor your traffic in real time in your console and if you exceed your traffic allowance you will be billed at the per respondent rate of your tier for each additional respondent (as defined in your subscription agreement).

In addition to your subscribed tier, you can keep several months worth of data in your console. The ion platform stores your respondent (visitor) data until you delete it. Some customers store about 4 months worth of data at any time, deleting anything older than 4 months. Others optionally choose to upgrade their storage capacity to store more data in their console. We've made it affordable to upgrade your storage capacity and have storage options for up to 100 million respondents!

The ion platform generates the real time performance reporting gauges based on your stored data. When you delete your stored data, you delete the data from the associated Performance gauges and reports.

We find storage needs to be unique to each customer. Some customers like to delete data and store the 4 months that is standard (that means at any time, their real-time gauges will be showing data on about 4 months worth of respondents). Other customers prefer to never delete, and choose to upgrade their storage rather than deleting data. It's up to you!

When you log into your ion console your dashboard will display your unique respondents for the month, and your total data storage.

Tip: When you delete stored data from your platform, you delete theme from your real time reporting gauges as well.

This makes it easy to keep your fingers on the pulse of your traffic volume and storage.

Pointing Domains & Subdomains to ion

When getting started with the ion platform, one of the first things you should do is decide what domain you would like to use for your ion console (and thus, the pages that are created in ion). This will be the main domain users will see when they are on your landing pages. You will either purchase a new domain to use for your ion pages, or you will have a subdomain created based on your company's primary domain. You can point as many domains and subdomains to ion as you wish.

When your ion console is initially set up, it will have a temporary domain:
yourcompany.postclickmarketing.com

In the above example, "yourcompany" is your company name. The ion team will create this URL and provide it to you prior to training. It requires no help from anyone on your team.

ion will also provide you with a unique IP address for your ion console. You can purchase a new domain (URL) and point it to your IP address, or you can set up a subdomain of your primary domain. You can use whatever subdomain you prefer; one we recommend is:
landing.yourcompany.com

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In order to use a subdomain, you will need to ask the person/team who handles *yourcompany.com* domain to create the subdomain "landing" for *yourcompany.com* (*landing.yourcompany.com*) and create an A record to point the DNS to your ion IP address.

Setting up the subdomain and pointing it to the IP address we provide to you is very straightforward and is the preferred option for most customers driving traffic to ion pages from direct mail, intra-site and search engine marketing.

Google pay-per-click campaigns require your display domain to match the destination domain, so setting up a subdomain version on your display URL is mandatory for landing pages you create for your search engine marketing campaigns.

Once a domain or subdomain is pointed to the ion platform you will set them up in the domain manager under "Settings". Your subdomain/domain will not work unless you set them up in your domain manager in the ion console, so don't forget this important step.

To add your domain/subdomain to the ion platform, work in the domain manager:

1. To begin, hover over the settings tab in your ion console and click 'Manage Domains'

2. Click the green '+ domain' button

3. Give your domain a unique name in the 'Domain Name' text field
    a. i.e. "*landing.yourcompany.com*"

4. Designate this domain as the default domain (optional)
    a. **Note:** if this domain is setup as the default, it will be the default subdomain when a traffic source is opened (it can always be changed as you are creating traffic sources).

5. Specify if this domain will support an SSL certificate
    a. This option will designate whether or not your domain or subdomain will require a certificate that ensures secure transactions between web servers and browsers.

    b. A domain or subdomain that requires an SSL certificate will use "https" instead of "http" on associated pages and indicate to visitors that it is a secure website with a lock icon

The location of the lock icon varies between browsers. In Internet Explorer, it appears in the lower-right corner of the browser window.

    c. IMPORTANT: If you do have a subdomain or domain that requires an SSL certificate, please contact your account manager to initiate the steps to put this certificate into place within your domain.

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6. Designate a redirect URL that you want to send people to when they don't provide a complete URL matching a specific traffic source. This is to ensure respondents who come to a bad URL are redirected properly.

    a. This might happen if respondent just types in the root domain, such as *landing.yourcompany.com* without a specific friendly "slash name" address or a /Casting.aspx automatic address to identify a particular traffic source

    b. This might also occur if respondent uses a URL that does not exist (i.e. *landing.yourcompany.com/badguess*)

7. You have options for how respondents are sent to the redirect URL
    a. Go to the redirect URL "as is": respondent will be sent to the redirect URL and treated as an organic, unique visitor to the redirect URL

    b. Append path and query string: respondent will be sent to the redirect URL with their originally intended path and query string information appended to the URL for data/metric tracking purposes.

    c. Append the query string: respondent will be sent to the redirect URL with their originally intended query string information appended to the URL for data/metric tracking purposes.

8. Select one of the following redirect types
    a. 302 redirects inform respondents and search engines that the redirect is temporary

    b. 301 redirects will indicate to respondents and search engines that the URL has been changed permanently

For most redirects, you will want to select a 302 redirect. If you are unsure of which redirect to select, check with your SEO manager.

9. Select whether or not you would like this domain to include auto-generated sitemap.xml in robots.txt
    a. Opting into this feature would automatically inform search engines that this domain or subdomain is available for crawling and will also automatically update additional information about each URL (i.e. when it was last updated)

10. Enter any custom robots.txt you want to exclude into the associated text box

Web Robots (aka "Web Wanderers, Crawlers, or Spiders) are programs that automatically search the web to index content. These may be search engines, such as Google, as well as spammers. By default, the ion platform will allow all robots.txt

11. Upload a favicon

A favicon is a graphic that appears in the left side of the address bar when viewing your ion landing page. The favicon must be an .ico file of either 16x16 or 32x32 pixels.

12. Click Save

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13. Add as many other domains you would like to have pointed toward your ion console

You can test that your domain is set up properly by simply typing your new domain into a web address bar and append "/admin" to the end of the URL (i.e. *landing.yourcompany.com/admin*). Your ion console login screen will be displayed and your domain setup is now verified as working properly.

Need help with this? Just let us know!

Configuration Settings

Another item you will want to take care of before you start building your creatives is your site configuration settings. To do so, hover over the settings tab and select "Configure Site." From here, you can upload a favicon that will display in your browser's address bar when working in your console. You can also change the logo that is displayed when you log into your console as well as the logo displayed in the top left corner of your console by uploading them in this area.

The configure site page also allows you to setup a console fallback URL. Although the ion platform performs at a historical 99%+ uptime, in the rare event that your console were to experience a momentary interruption of service, your console's Default URL will kick in and take respondents to the fallback URL you designate. This URL is typically set to your company's standard website, but you can send respondents to any URL you would like with the default URL.

You will also see SMTP host options in your configure site page. Should you decide to use the ion platform to send emails to respondents, you can update these settings to reflect your own email server's settings and also change the default email address from which ion will send emails.

At the bottom of your configure site page, you will see the option to update your statistical confidence. The ion platform will use this percentage during your tests to declare a test winner. Once the platform reaches the level of confidence set here that one creative will outperform another, traffic will automatically be removed from the underperforming creative and instead will be sent to the winner of your test.

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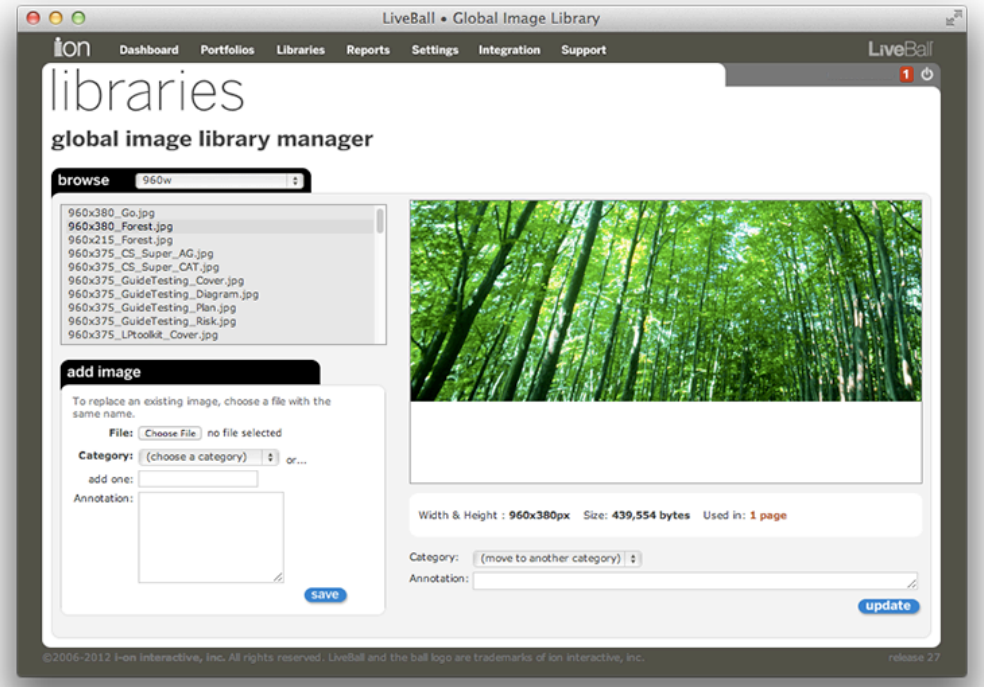
Libraries

The ion platform makes it easy to manage your content. You can organize all of your images, tracking scripts, forms and more from one central location in your libraries tab in the main navigation of your console. These elements can then be included on the pages you create in your ion creatives.

Global Image Library

Your image library is where you can manage your images. Upload as many .gif, .jpg and .png images as you would like to your console and organize them by adding categories for certain images. Once your images have been uploaded to your global image library, you can use them in any creative in your console.



Global Flash Library

Any image in a page may optionally include Flash.

The ion platform's Flash implementation makes it possible for non-technical ion publishers to change the text and links within a Flash .swf file that has been configured for dynamic content.

You can use your global Flash library to organize your Flash (.swf) files. Using your familiar library interface, you simply add .swf Flash files to your library. The ion platform automatically senses the width, height, file size and Flash version of your .swf file. You may use any version of Flash file in the ion platform, although some of the more advanced ion features are best accessed using Flash 9 (or higher) with ActionScript 3.

After you add a Flash file to your library, you'll notice a 'Set Flash Variables' pane just below the library preview window. Properly developed Flash files can include variables/instances for dynamic text, images and links. The ion platform can easily substitute

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text, images and links for these variables. You must know the exact names of any text or link (URL) variables in your Flash. In the set variables pane of the Flash library enter the exact (case sensitive) name of each variable or instance in your Flash.

Later, when you add your Flash to a page, you associate dynamic text, images or links to the Flash you just added to your library.

Learn more about this advanced functionality in the ion support site.

Global Fulfillment Library

You may want to offer a file download or fulfillment (e.g., whitepaper, brochure, etc.) on your landing experience, and the ion platform makes it easy to maintain a complete library of fulfillment items for use in any of your ion creatives or email templates. These are called fulfillment files in the ion platform and you can find them under your library navigation.

You may upload any .doc, .docx, .xls, .xlsx, .ppt, .pptx, .mp3, or .zip file you would like to make available for download by your respondents on your pages.

Global Forms Library

In the ion platform, you can create forms to place on your pages in order to collect visitor contact information. You have full control over the types of forms you create and can even upload custom HTML forms. You can build single-page forms, multi-page/multi-step forms, multi-lingual forms, forms with hidden data, forms with conditional logic, forms that use a lookup table, and much more. ion has advanced, sophisticated form features that will meet your most rigorous requirements.

Forms are created and managed on separate axes to give you maximum flexibility — you are in control of how how you want the data collected, displayed, validated and exported.

You define data fields, choice sets and field-level validation. Separately, you build your forms using these fields in ion's easy-to-use, totally robust form library. You then bring forms into your page when you are working in your templates by clicking a form element and adding your form from the library.

Once your form is on a page you can associate an export, or multiple exports, with the form in order to export your form data in batch or real-time. Forms, data fields and exports will be discussed in greater detail later on in this manual.

Email Templates

Email templates enable you to send fulfillment emails to respondents at different stages within a path, typically as a post-conversion delivery vehicle for an offered document or download. This is a “one email to one person” feature allowing you to set a rule in a page to send an email to a visitor who has provided their email address (it is not an email campaign management system —although the ion platform does integrate with most popular email platforms so you can pass data into them, or from them to your ion pages for personalization).

Learn more in the ion support site about how to create email templates in your library.

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Global Script Library

The ion platform can support most third-party scripts for tracking, analytics and system integrations. The global scripts library is a powerful feature because it lets you manage these scripts centrally and then pull them into your campaigns and pages with a simple drop-down. If your scripts ever change, you can update them centrally in the library.

Learn more about this important feature, and how to take advantage of it, in the ion support site.

Global Widget Library

You can add, track and test interactive tools or dynamic design elements on your ion pages by leveraging the global widget library. The global widget library provides centralized management and enables you to define variables in your portable code to make your applications dynamic and track-able. You may use your widget library to add interactive elements such as YouTube videos, Google Maps, and much more!

Learn more in the ion support site.

The ion platform also comes pre-loaded with what we like to call “Ready-Made Widgets.” These widgets can be used in any page within your console! Our ready-made widgets are powerful tools to increase the level of interactivity on your pages. Ready-made widgets can be used to help organize the content on your page, rotate content across your screen, increase your social marketing efforts and much more!

Tracking Conversions

You can use the ion platform to track any final action you are driving respondents to take by setting up conversion points. Every time a respondent reaches your conversion point, the ion platform will make a note of it and calculate how many respondents “converted” in relation to the total number of visitors your page has received. This metric is referred to as your “conversion rate” and can be found on your dashboard, in your performance tabs and in your reports. You can use the ion platform to track conversions that occur either directly within one of your ion pages or externally from your external website.

Internal Conversions

Marking an action as a conversion point inside an ion page is as simple as checking a checkbox. If you are collecting lead data through a form, your conversion point will likely be the submission of your form. To mark your form as the conversion point in your creative, simply click your form to open the form editor and check the “mark respondent as converted” checkbox. When you click save and go live with your creative, any respondent who submits the form will be calculated as part of your conversion rate.

External Conversions

If you are looking to track external conversions, through an external shopping cart for example, you can install a small piece of code on your external “Thank You” page to track external conversions back to the original ion creative. This is great for testing what elements on your pages are the most influential in driving your visitors to make a purchase. Tracking external conversions is also a great way to test your ion creative against a landing page that was built outside of the ion platform. By implementing the external conversion tracking Javascript and setting up a simple split test, you can start testing against your external landing page in no time!

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Integrations

If you use a marketing automation system, simply send traffic to your awesome ion landing experiences, instead of the automated system's basic landing pages. Each automation system has its own prospect tracking code, which you can add to ion campaigns or thank you pages to track prospect activities. Essentially, the ion platform sits "in front" of your automation system and provides a superior, high-performance conversion experience for your prospects. Integrating the two systems is usually straightforward. Common integrations include:

- Eloqua
- Hubspot
- InfusionSoft
- Marketo
- Pardot

Because the ion platform is an open system that makes it easy to pass data in and out, we have many customers who seamlessly and automatically use ion with Marketo, Elqoua and other post-conversion marketing automation systems. Once the integration is complete, data collected in the ion platform will be transferred into your marketing automation system in real time as forms are submitted.

Custom Integrations

Because of the platform's flexibility, you can also set up your own custom integrations! To do so, you can upload scripts to a centralized script library and implement your tracking scripts in your pages through a simple drop-down menu. With your scripts in place, your live pages will send click data to virtually any marketing automation platform. You can also set up an export that can send data to an external web service and receive an XML response. Based on that response, you can set up advanced rules to serve up different content to respondents and trigger different actions (i.e. export data to specific places).

Our team is happy to work with you on custom integration projects. For more information, please reach out to your dedicated account manager.

Progressive Profiling

Are you looking to use email blasts to drive respondents back into your ion pages after converting? You can use your ion integration to serve up new content for your return visitors and build a progressive profile of that respondent to add to the information you have already collected!

Progressive profiling works with your marketing automation or email platform (i.e. Eloqua, Marketo, etc.) to track lead behavior over time. Your email/marketing automation platform will provide you with a dynamic tag that can be used to pass information back into the ion platform from a previous visit.

The foundation of progressive profiling is creating multiple forms in your global forms library with questions that each build on the previous one. Don't worry about asking for the same information twice as it will all stay with the respondent's progressive profile in ion.

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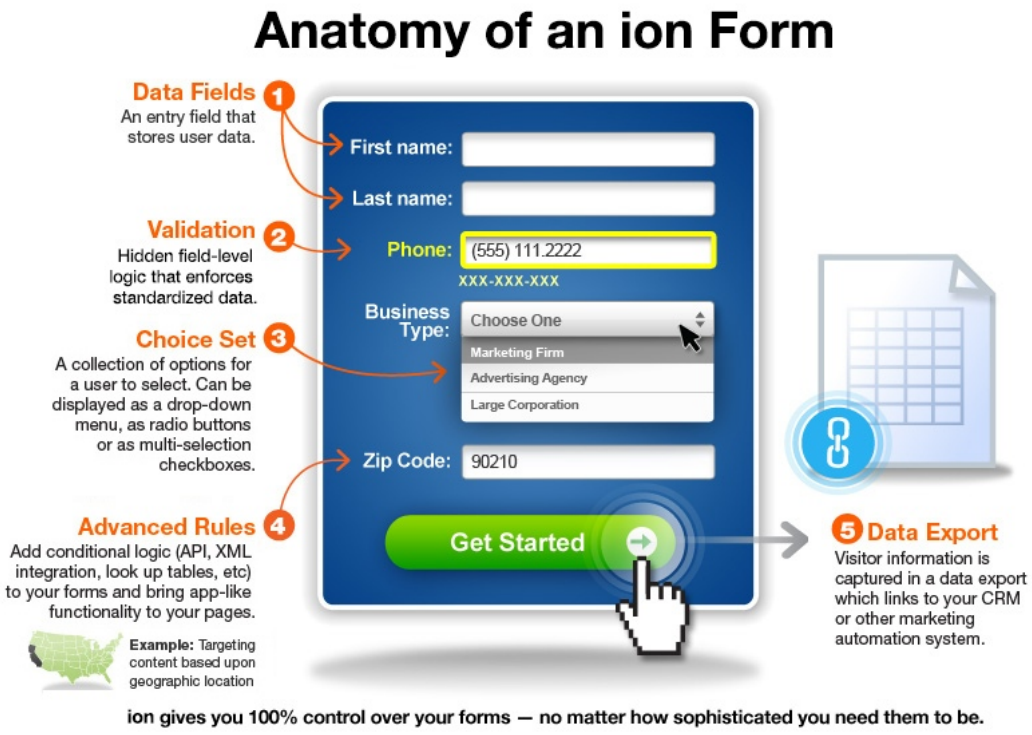
Understanding Forms and Data Exports

The ion platform makes it easy to create forms and place them on your pages to collect visitor contact information. This information will be saved to your console and can be exported to your inbox, your Salesforce account or virtually anywhere you would like to send it.


Anatomy of an ion Form
Data Fields
An entry field that stores user data.
Validation
Hidden field-level logic that enforces standardized data.
Choice Set
A collection of options for a user to select. Can be displayed as a drop-down menu, as radio buttons or as multi-selection checkboxes.
Advanced Rules
Add conditional logic (API, XML integration, look up tables, etc) to your forms and bring app-like functionality to your pages.
Example: Targeting content based upon geographic location
First name:
Last name:
Phone:
(555) 111.2222
xxx-xxx-xxx
Business Type:
Choose One
Marketing Firm
Advertising Agency
Large Corporation
Zip Code:
90210
Get Started
Data Export
Visitor information is captured in a data export which links to your CRM or other marketing automation system.
ion gives you 100% control over your forms — no matter how sophisticated you need them to be.

Your ion forms are comprised of data fields, choice sets and validation patterns. Before you create your first form, you will want to make sure you have created any data fields, choice sets and/or validation patterns that you would like to use in your form.

Forms are created in the Form Library and then can be added to any page when you are publishing your creatives.

Data Fields

Data fields are the fields you would like to include on a form. For example, common data fields are: first name, last name, email address, phone number, etc. You can also enable data encryption and set up hidden data fields as well (data captured, but not displayed on a form).

For sensitive data, you may also choose when to automatically remove data collected by this data field (optional) or choose to encrypt the data.

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To create a data field, follow the steps below:

1. Navigate to the Integration menu and click on the Data Collection menu item
2. Click on the magnifying glass beside the category you'd like to add the field to, or add a new category
3. Click on the "+data field" button
4. Give your field a friendly title and optionally add notes in the description field
5. Create a data name which is the value in which the data will be stored under
6. Set the maximum number of characters allowed for this field
7. Optionally select a validation pattern and add a default value
8. Encrypt data collected by this data field by checking the encryption check box (optional)
9. Save

Choice Sets

Choice sets are the choices you will make available for questions that have more than one possible answer. For example, a list of countries that will be available in a drop-down field on a form. Think of these as the "answers" that will appear in drop-downs, radio button choices or as checkboxes.

To get started, click on the magnifying glass next to the category name for the choice set.

1. To add a choice set, click the green '+ choice set' button. You'll need to enter a unique label and optional description. Before you click Save, you also have the option to copy an existing choice set — this is helpful when the choice set you want to add is very similar to an existing choice set. For example, to create a modified list of states (perhaps limited to the states where your product/service is available), select the geolocation category and choose the US States choice set to copy...then simply delete the states from the list that don't apply.
2. To edit a choice set, click on the magnifying glass to the left the choice set name. Then click on the pencil next to the choice name to edit, or the trash can on the right to delete.
3. To add a choice to a choice set, click the green '+ choice' button. Then enter the choice name you'd like to show respondents, as well as the choice value you'd like to associate with this choice and store in the database (if applicable).
4. You can re-order choices in a list easily by clicking on the choice and dragging it to the desired position.

TIP — When adding a list of choices to appear in a drop-down menu, add '(Select one)' or '(Choose one)' as the first choice in the list (no choice value needed)—this will appear as the default in the menu.

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Validation Patterns

Using "regular expressions," you can define how a field should be validated. If you don't know what this means, don't worry! ion comes with common validation patterns pre-installed. For example, standard validation patterns check to ensure a valid email address and telephone numbers are entered by the visitor. Additional validation patterns and custom regular expressions can be added to the validation pattern library at any time.

Forms

Forms in the ion platform are independent of pages. Forms are stored in their own centralized library that you can access to insert them into your pages. Forms can be inserted in narrow spaces, wider spaces, high on pages, low on pages, within content, below content — anywhere on your pages where there is an available form area.

When building forms, you can start from scratch and just add the fields you want on the form, or you can start with a pre-built form —copy them, edit them, etc.

Custom HTML forms can also be created in the ion platform. You provide the complete HTML for the form — the opening ‹form›, closing ‹/form› tags and everything in between.

Create/Edit a Form

Forms are setup at the global level, so they are available for any campaign or framework. Just select 'Forms' from the 'Libraries' main navigation menu to get started.

1. Click the green '+ category' button to create a new form category. Or click the magnifying glass to the left of a category name to add a form to an existing category. Categories are just a way to group and organize your forms (e.g., Contact Forms, Survey Forms, etc.) Descriptions may also be added to categories.

2. Click the green '+ form' button, then choose a unique form label (title) and optional description. Next, you may choose between a standard table generated form or a custom HTML form from the input type drop-down menu. For this example, we will discuss the table generated option and will come back to the custom HTML form option a little later.

3. From the “# of columns” drop-down menu, you can choose whether you would like to build a one or two column form.

4. Next, specify what percentage of space you would like to allocate to your labels, fields and gutter (for a two column form).

5. Before clicking to save, you have the option to copy form fields from an existing form. If you copy a form, you will still be able to make changes to it; this is a convenient option if there is a similar form already in your library or when creating several versions of the same form.

6. Save the form, then click the green '+ form field' button to begin adding the form fields, including any questions and answers, to appear on your form. These are fields that are already available or that you have previously created in the data collection section of the ion platform.

    a. Choose a data field category from the first drop-down menu, then choose the data field from that category in the second drop-down menu.

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b. Choose the input type for the field—this will determine how the user will provide information on the form. You may choose from single or multi-line text (for free-form questions), check box (for multiple choice questions), listbox (for choices to appear in a selector box), radio buttons or drop-down list (for single choice questions). The type of question you are asking will determine the input type. Then:

   i. For single or multi-line text fields, choose the input style—standard, narrow or wide fields. For multi-line text, you can also specify the line height to be 2-10 lines.

   ii. For radio buttons, drop-down list or listbox, select the choice set category from the first drop-down menu, then choose the choice set to use for this field in the second drop-down menu. For a listbox, you can also specify the input style (narrow, standard or wide) and the line height to be 2-10 lines.

c. Check the 'Required' box if a respondent must fill out this field to submit the form.

d. Enter your label text—this the text that a respondent will see before the form field.

e. Add a field hint (optional)—this will appear below or to the right of the field, depending on the form size.

f. Add pre-field text (optional)—this is useful to give form information or instructions at the top of the form. (e.g., * indicates required fields)

As a best practice, add an asterisk (*) or another visual indicator in front of the field label text to clearly distinguish required fields from optional fields on the form.

g. Add post-field text (optional)—this will appear below the field label on the form.

h. Check the 'Separator' box if you would like to insert a line separator after a field on the form—this is useful to visually group related fields on a form.

i. Click ‘Save’ and continue adding the remaining fields on your form.

After you add fields to the form, you can easily reorder them by using your mouse to click and drag the fields to the desired position. Questions on the form will appear in the same order they appear in the form field list. Your form is now ready to use on any path in the ion console! Remember, it’s always a good idea to test your form using preview to make sure it's configured the way you intended. And now that the form is set up, the next step is to create an export for the data you're collecting.

Add a Form to your Creative

Once your form has been finalized in your form library, you can add your form to any creative in your console. If your creative is based off a ‘Quick Start’ or another copied creative, your page(s) likely will already contain a form. If you are starting from scratch, you will see a placeholder spot for your form.

To add your new form to one of your pages, double click either the form that is already in place or the placeholder to open the form editor. Next, select the form category from the left side of the form editor fly-out and then select the form title on the right side. Your form will immediately render on your page.

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You will also see a section labeled “BUTTON AND HINT TEXT” in the content tab of your creative studio where you can enter custom wording for your form’s submit button and define whether or not to place hint text in its own column. By default, it will say submit, however, you can type anything else you would like into the available field to change the wording of your submit button. Alternatively, you can select an image from your image library if want to use custom submit button that you have designed.

Next, you will define the action that is taken when a respondent submits the form within the content tab of your creative studio. You can choose to take them to another page within the creative (i.e. a Thank You page), trigger a download from your fulfillment library or take respondents to an external URL. You can also apply a tag for reporting purposes and mark the form submission as your conversion point. To mark the form as your conversion point, simply check the available “mark respondent as converted” checkbox.

After one or more actions are selected, click OK. If you’d like to add advanced rules to the form, click the ‘+RULES’ button in the Content tab of your creative studio.

Custom HTML Forms

If you are code savvy, the ion platform gives you the ability to code your own forms using HTML. This gives you the ultimate freedom to code virtually any functionality into your form that you would like. With a custom form, you provide the complete HTML for the form — you may also include non-editable content outside the opening ‹form› and closing ‹/form› tags.

By default, ‹input› and ‹select› tags will be saved with the names of their IDs, although you can override those and assign them to data collection fields if you prefer when editing fields from the next page.

The choices for checkboxes, radio buttons, drop-downs and list boxes should be included in your custom HTML. However, you can optionally substitute the choices in ‹select› drop-downs and list boxes by assigning them a choice set when editing fields from the next page. Note that currently all ‹option› tags in your HTML must have closing ‹/option› tags.

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The data collected on your custom HTML form will be saved into the ion database upon form submission. You can also export the data collected on a custom HTML form using any export format supported by the ion platform. Form-level advanced rules will be available to leverage, as well!

You must provide your own button to submit the form.
You may also include ‹style› and ‹script› blocks, usually in front of the ‹form› tag, to impact the look-and-feel and behavior of the form. (Be careful to avoid CSS and Javascript conflicts with your master page templates and themes.)

Learn how to implement your own custom HTML form by reading more in the ion support site.

Multi-Step Forms

In the ion platform, you can link multiple forms together to create a multi-step form experience. If there is a lot of information you would like to collect from respondents but do not want to present them with one long, daunting form, you may create a multi-step form experience. To do so, create a separate form for each ‘step.’

Once each form for each step has been created, follow these instructions:

1. Navigate to the ‘Creative Management’ screen where you plan to utilize your multi-step form
2. Add pages to your creative for each form step (if necessary)
3. Open the page editor for the first page where the form will be present
4. Place the first step of the form into the form editor. When placing the form take respondents to the next page where the second step of the form will be located.
5. Repeat step 4 for the other steps while taking respondents to the subsequent page
6. On the final step of the form, take respondents to a “Thank You” page, mark the submission of the form as converted and set up your export rule (if necessary). The platform will export all the data collected on all the steps.

To summarize, you can create multi-step forms by simply stringing your pages together in a single creative and marking the final step as your conversion. With the steps in place, all information will be captured by the ion platform and passed on to the next step in the creative. The ion platform captures the data from each step and can export it all together. You can even export partial completion data for visitors who do not complete the final step.

Data Exports

Any data you collect in the ion platform, such as form data and hidden data, can be exported to external sources. You can also export “core fields”, which is data that ion automatically collects on visitors when they hit your ion pages. Core fields are collected whether the visitor converts or not, and includes things like IP, geo-location, behavioral tags, timestamp, etc. There are numerous core fields that are available for export along with the data you collect on your forms.

When you set up your export formats, you can 'marry' your data exports to your forms or campaigns, so you are in control of what data gets exported, to whom and when.

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Data can be exported once, to a single export, or can be exported multiple times in multiple formats. Exports can be scheduled in batches, or delivered “real-time” when the visitor data is collected. It's up to you! This flexibility is helpful for distributed teams or teams who use multiple platforms and need data exported in a variety of formats.

Export Formats

The ion platform’s export features are powerful. Many export options are standard and easily configured by your non-technical marketing staff. Standard exports include:

- Post to web form
- Create lead in Salesforce.com
- Delimited file
- Formatted email
- Post XML/JSON to web service
- v-Card-format file

Each export type has its own configuration called its "format." Export formats are designed to easily map your form fields to your export fields. We will discuss setting up a few specific export formats later on in this section.

Other exports may need more technical expertise, or even some level of customization and custom development. That's OK! We're here to help support your export needs—it's our job to help you get the data out of the ion platform in the format you require. Your account manager can help you by involving our marketing technology team—specialists in helping you set up complex data exports and integrations. We are available for custom projects, troubleshooting, training and more.

Steps to Build & Use Exports

To create and use an export, follow these steps:

1. Create your export format in ‘Integration’ under ‘Data Exports’ from one of the standard export options listed above.

    a. When you name and define your export format, you will then add data fields to your export format. This defines the data to be exported. Options will include mashing up fields, adding javascript, setting default values, and doing custom processing on the data. This process should feel fairly similar to adding data fields to your forms.

2. Once you have the export format created and the data fields associated with the export, you actually create the export by hitting the green ‘+export’ button (located on the same screen on the ‘Data Exports’ page).

    a. Define the export scope (converted respondents only, or everyone) and the export format you created in step 1.

    b. Schedule the export (as frequently as you wish per day of the week and hour of the day) to run in batches.

        i. If the export isn't going to run in batches, and is a real-time export, you will skip this step and invoke the export when you actually add forms to your pages using the ‘+RULES’ button within the content tab of your creative studio.

    c. Input email addresses if you want the export to be emailed to anyone

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3. IMPORTANT STEP

   a. TO BATCH EXPORT—associate the export with your campaigns: Marry this export to the campaigns where it should run. In a campaign there is a link in the upper right hand area of the page for 'Scheduled Exports'. Here you will "marry" the export to the campaign.

   b. TO EXPORT IN REAL-TIME—when working in your creative page templates, when adding form(s) to the page, use the '+RULES' button in the content tab of your creative studio to trigger the export upon form submission, in real time, each time a form is submitted on the page.

Exchange Data Using a Web Service

On the fly, the ion platform can read an identifier off of the incoming query string, pass that ID to an external customer web service, and receive data back via XML. This lets you pass back — in real time prior to the first page rendering — personalization data that ion can use to affect the display of the page. Any data can be exchanged using this method, letting your ion pages behave dynamically.

Pull an On-Demand Data Export

Data can be downloaded on demand at a global and/or campaign-wide level in your ion console. On-demand data files contain all information collected in your lead forms, in addition to all system fields that are automatically collected by ion (IP, geo information, respondent id, etc.).

Export Global Respondents

Access the global export feature via the link at the top of the data exports page (Integration > Data Exports). Click the link to specify scope, set a date range and download an Excel-ready .csv (comma-separated) text file.

Export Campaign Respondents

Access the campaign export feature via 'Campaign Resources' at the top right of your campaign management (Portfolio > Campaign > Campaign Resources: Export Respondents) Click the link to specify scope, set a date range and download an Excel-ready .csv (comma-separated) text file.

Check out the ion support site for step by step instructions to set up exports such as:

- HTTP Form Post or GET Export
- Salesforce.com API
- Salesforce.com Form Post
- Delimited File Export
- Formatted Email Export

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Creating & Going Live

Creating Landing Experiences

Each landing page experience you make in the ion platform can be comprised of a series of pages linked together. In the ion platform, we refer to each landing experience as a "creative." You can create and send traffic to as many creatives in the ion platform as you would like.

You have three options to create your creatives:

1. You can use a quick start, which is a pre-built landing experience that is ready for your content & customization. Quick starts are the fastest way to create experiences in the ion platform.

2. You can copy any existing creative from anywhere else in your console.

3. You can start from scratch by selecting your framework (your collection of templates), then adding pages to the creative. The pages you add will be templates with areas for content that are blank—you can just add your content to the blank template to build your page(s).

TIP: To get started, add a portfolio, then add a campaign to the portfolio, then add a creative to the campaign. Creatives live inside your campaigns.

Key Concept: Quick Starts

A quick start creative is one that has some content (or placeholder content) and is ready for you to finalize and launch. They provide a fast way to go live with a robust landing experience. The quick start creatives can live in a 'Quick Start' portfolio for easy organization. Just copy from your quick start portfolio to go live quickly.

You have the ability to flag a specific portfolio as your "quick start portfolio". Your quick start portfolio will ideally be one from which you find that you are making a lot of copies. By flagging that portfolio as your quick start portfolio, you will be able to make even quicker copies than before! Want to mark a different portfolio as your quick start portfolio? You can make mark any portfolio as your quick start portfolio by clicking the pencil icon next to your portfolio's title and check the "Quick Start portfolio" checkbox.

If you subscribed to ion after January 2012, your ion console comes pre-loaded with a collection of quick start creatives that are pre-built. You add your content to them and go live—enabling you to create landing experiences quickly & efficiently.

Quick start creatives are organized by purpose (lead generation, social, mobile, etc.). The ion platform gives you many conversion-ready quick start creatives to choose from but you may also opt to customize your quick start collection by adding categories to it, or moving creatives into different categories. You will be able to use your quick start portfolio to make quick copies of creatives that you can use to make small changes to go live with a new creative. To add a new creative to your quick start portfolio, navigate into any campaign in your quick start portfolio and click the green plus sign. Next, you can choose to copy a creative from another campaign outside of your quick start portfolio or build a new creative from scratch.

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We encourage you to prep your quick starts for launch by adding elements required for launch. This will reduce production time and eliminate human error by adding "the essentials" to your quick start creatives. As a best practice, we would recommend you copy your most often used creatives into your quick start portfolio and make sure the following elements are present and ready for launch:

- Page-level tracking script
- Advanced rules that trigger immediate exports
- Meta-data
- Privacy policy content
- Footer content and links

Types of Quick Starts

There are several categories of quick starts to choose from. We have them categorized based on purpose. While these creatives are a great way to get launched quickly, they also serve as examples of the many different layouts you can choose from in the ion platform. You will always have the option to mix and match the pages you like to create a completely unique experience.

- **E-Commerce:** These creatives are geared toward displaying product images and encourages respondents to click into an external shopping cart where they can make a purchase.
- **Land & Jump:** Similar to the E-Commerce category, these creatives were designed to influence respondents to click links to external pages.
- **Lead-Generation:** These creatives contain forms to gather lead information from respondents looking for more information on your product or service.
- **Mobile:** This category will demonstrate the many options available for building mobile-optimized creatives to collect lead information, influence a purchase of a product, etc. Your mobile quick start creatives can be used to take any of your marketing efforts mobile.
- **Page Parts:** This campaign/category demonstrates creatives that were built with variable widths. These will be extremely helpful should you decide to display content built in ion through an iframe or lightbox on another site. The layouts used by these creatives will automatically adjust to the dimensions of any iframe or lightbox you use to display the page.
- **Social:** This category is perfect for your social marketing efforts. In this category, you will find creatives that use layouts that are optimized for Facebook page widths. You will also find creatives that have been made to serve as a landing page for visitors coming from Twitter.

Quick starts are powerful, quick ways to publish robust, sophisticated landing experiences. We hope you take full advantage of them!

If you subscribed to ion before January 2012, your console may have a portfolio called “Launch Pads” instead of quick starts. Although you may not have a quick start portfolio pre-loaded in your console, you can mark any of your portfolios, including your launch pad portfolio, as a quick start and utilize it to make quick copies of your own ready-to-launch creatives as well!

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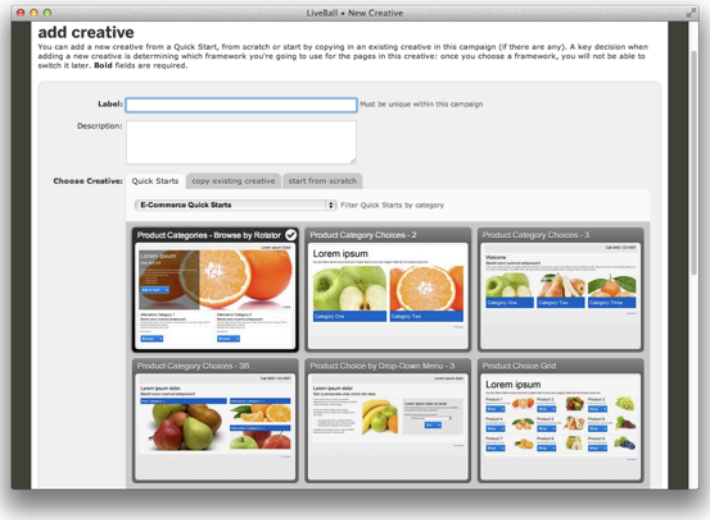
Adding a New Creative

To begin building pages outside of your quick start portfolio, navigate into the campaign where you would like to add your new creative and click the green plus sign. After you give your creative a title, you will see three options for your new creative.

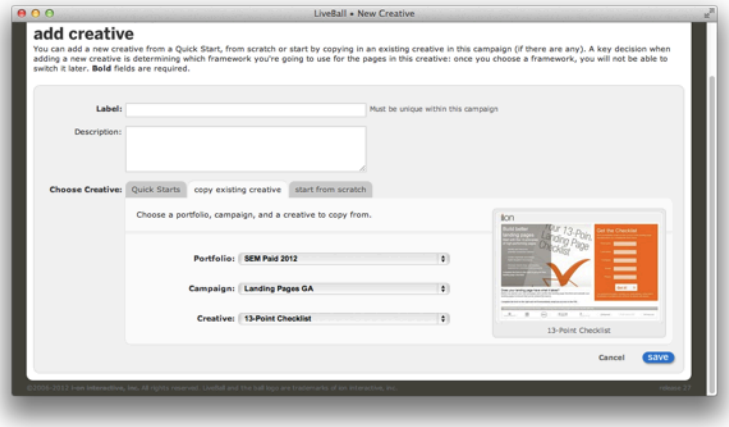
1. **Copy from Quick Start Portfolio**

Select the quick starts tab to copy one of your quick start creatives. To get started, select the campaign that contains the creative you would like to copy. You will see a series of thumbnails. Each thumbnail shows the first page of a given creative. Select the thumbnail of the creative you would like to copy and click save. Your new creative will now contain all the pages from the original quick start so you can make any necessary edits and go live!


LiveBall • New Creative
add creative
You can add a new creative from a Quick Start, from scratch or start by copying in an existing creative in this campaign (if there are any). A key decision when adding a new creative is determining which framework you're going to use for the pages in this creative: once you choose a framework, you will not be able to switch it later. Bold fields are required.
Label:
Must be unique within this campaign
Description:
Choose Creative:
Quick Starts
copy existing creative
start from scratch
E-Commerce Quick Starts
Filter Quick Starts by category
Product Categories - Browse by Rotator
Product Category Choices - 2
Lorem ipsum
Product Category Choices - 3
Product Category Choices - 3B
Product Choice by Drop-Down Menu - 3
Product Choice Grid
Lorem ipsum

2. **Copy Existing Creative**

You can also copy creatives that are not in your quick start portfolio. To do so, select the second tab. Next, simply select the portfolio, campaign and creative from the corresponding drop-down menus to copy your creative. Once you have selected the creative, you will see a thumbnail to the right of the first page in the experience you are about to copy. After you click save, you will be able to make any necessary edits and take your creative live!


LiveBall • New Creative
add creative
You can add a new creative from a Quick Start, from scratch or start by copying in an existing creative in this campaign (if there are any). A key decision when adding a new creative is determining which framework you're going to use for the pages in this creative: once you choose a framework, you will not be able to switch it later. Bold fields are required.
Label:
Must be unique within this campaign
Description:
Choose Creative:
Quick Starts
copy existing creative
start from scratch
Choose a portfolio, campaign, and a creative to copy from.
Portfolio:
SEM Paid 2012
Campaign:
Landing Pages GA
Creative:
13-Point Checklist
13-Point Checklist
Cancel
Save

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3. **Start From Scratch**

You also have the option to start from scratch with a completely blank canvas. After clicking the 'start from scratch' tab, select the framework in which you would like to build your new creative. Next, you can select any tracking scripts you would like to utilize creative-wide in either the <head> or closing </body> tags. You can also tell search engines to not index, follow and/or archive this creative for organic searches.

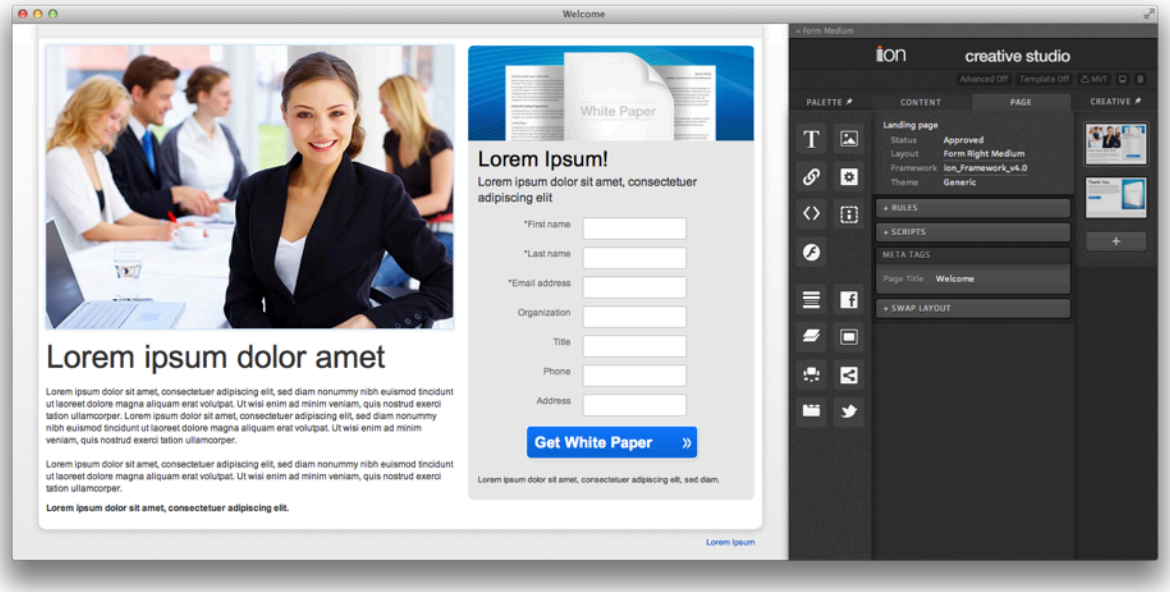
When you click save, you will be taken to a blank creative management screen. To add pages to your creative, click the green '+ page' button. After you give your page a title, you will see some familiar options for your new page. You can copy a page from a quick start creative, copy a page from a non-quick start creative or start from scratch. Should you choose to start from scratch this time, you will be presented with a list of page layouts (templates) to choose from. Simply select the layout you would like to use for your page and click save.

Page Editor: Adding your content to the pages in your creative

Once you have set up a new creative, it's time to start working in the page editor to add your content. From the creative management screen, you will see thumbnails representing each page within your creative. To add or edit page content, click the pencil icon in the lower left hand corner of its thumbnail.

Creative Studio

When creating and editing pages in your ion console, you will see the creative studio editing area on the right side of the page. This is where you add or edit the elements on your page. The elements you can edit are split into four tabs which can be expanded and contracted to control the amount of screen space the panel utilizes by clicking the pin icons within the tabs. These four tabs (from left to right) are: palette, content, page and creative.



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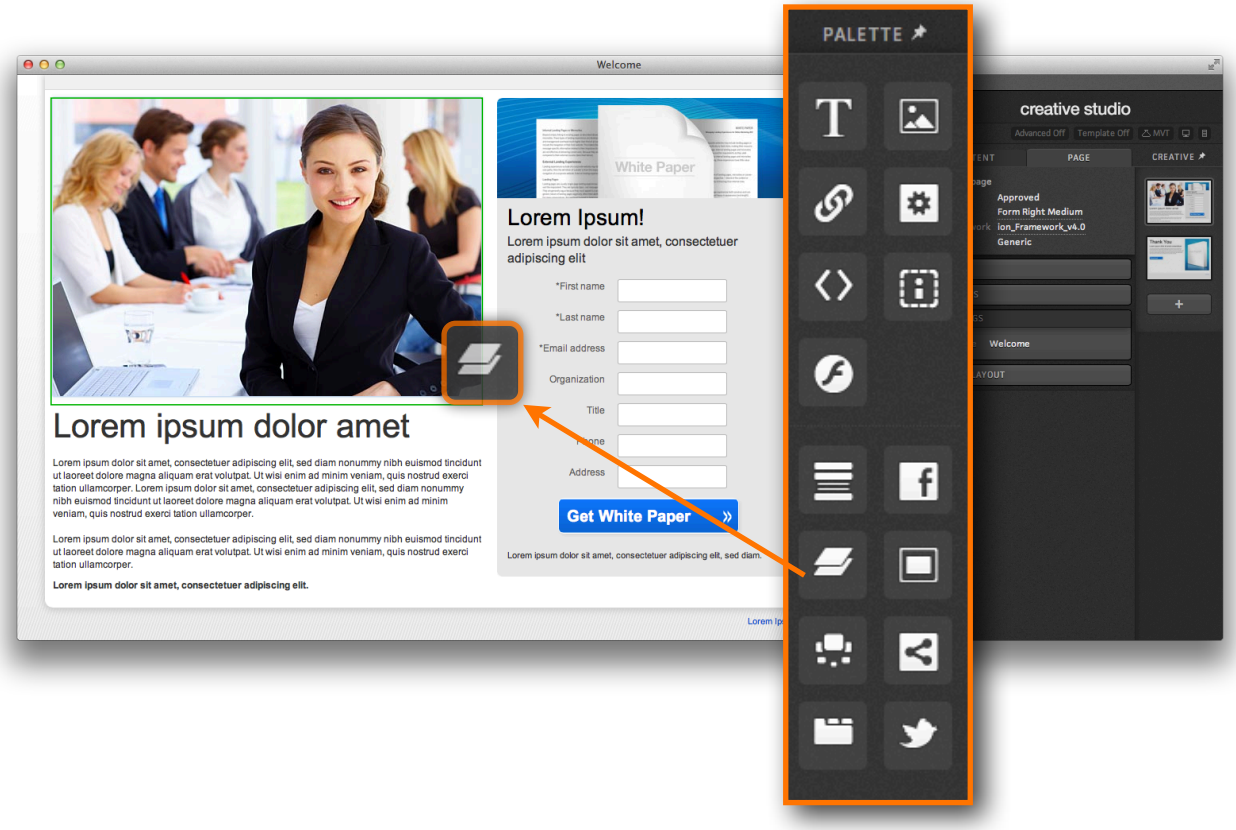
Palette Tab: Drag & drop elements onto your page

The palette tab contains icons for the various elements you can utilize within your page editor including text, links, images, flash, widgets and ready-made widgets. While your layouts come with these elements coded into them by default, you can also drag the icons in the palette tab on your page to place the element you want to use into that location.

The palette tab can also be used to swap elements on the page. To swap one element for another, choose that element's icon from the palette tab and drag it over the element on the page you wish to replace. You may drag and drop any icon onto your page to place the corresponding element into that location.



Content Tab: Edit your content without refreshing

The content tab is where you edit your elements. When you click an element on your page, the content tab will present options to edit that element. Double clicking a given element will open a fly-out editor to directly edit that element. You can also remove an element or save creative-wide directly from within the content tab.

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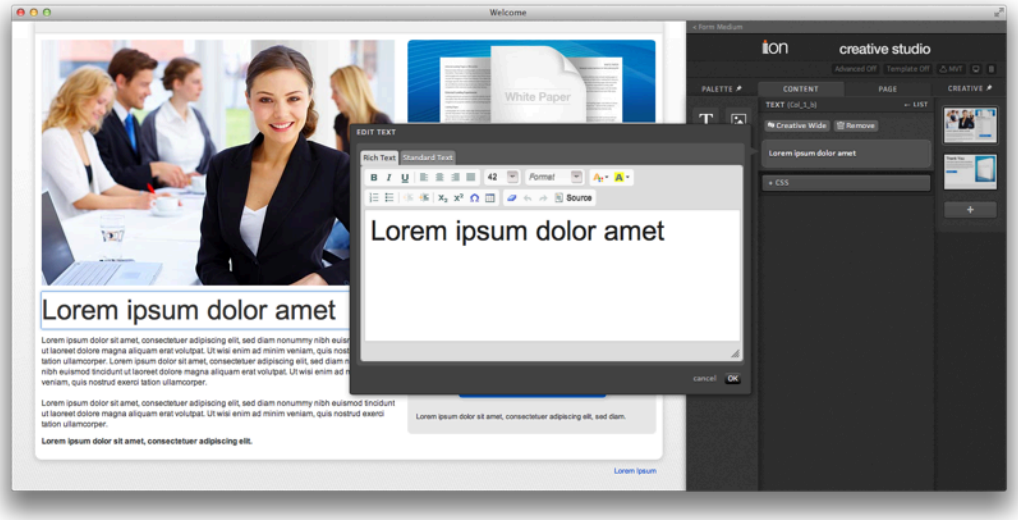
Text: Just click and edit

To edit text, double click the text to open the fly-out editor, make the update and the change will be immediately reflected on the page. By clicking on the CSS button on the content tab, you can optionally add inline CSS as well.



Images: Upload directly from your page

After double clicking an image, you will see the image library. From here, you can search for a given image or browse categories to choose an image from a specific image category.

To add a new image, you can upload it directly within the image editor! Simply drag and drop your images from your desktop into the fly-out image editor to use that image on your page.

Once your image is placed on the page, you can also use the available actions, advanced rules and inline CSS editors that are available within the content tab to make your image clickable, apply conditional logic and/or override the default style attributes using inline CSS.

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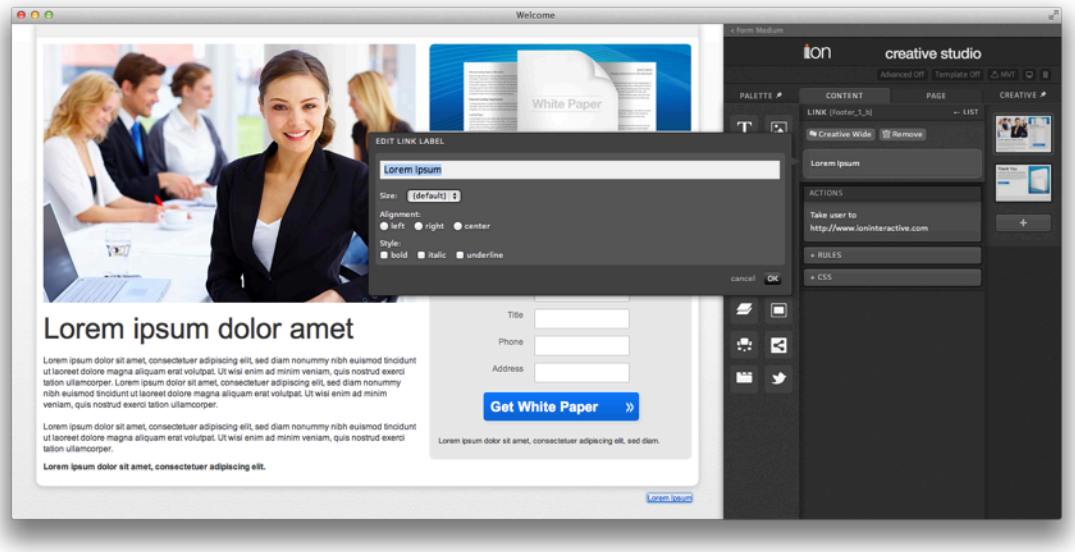
Links

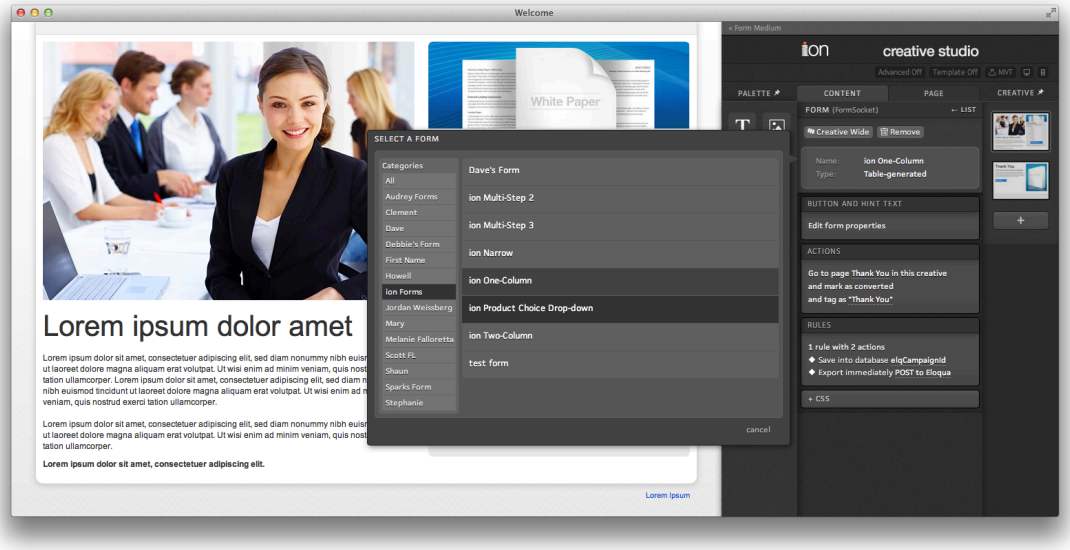
When you double click a link to open the editor, the link label editor will fly out. From here, enter the text you would like to use for your link and click OK. From here, you may use the additional editors in the content tab to apply the link action, advanced rules and inline CSS.



Forms

After double clicking a form, a fly-out will show the available forms within your form library. By default, the form editor will show all forms within the library and specific categories listed on the left side of the fly-out.

Once you've selected your form, you can then click "edit form properties" in the content tab to edit the button text and define if you would like to display hint text in its own column. Form actions are also displayed and editable from the content tab, along with advanced rules and inline CSS.



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Advanced Rules

Speaking of advanced rules, you can also create page-level advanced rules to display certain content to certain respondents who view your page! Your advanced rules can be used to show different messaging for your visitors in New York than shown to visitors in Los Angeles!

Do you have search campaigns running through Google? You can use your advanced rules to serve up different content to respondents based on their query string data. This means you can use your utm variables to send your traffic to a single URL where your ion page will show different content based on their Google campaign source, medium, term, content and name!

We could talk all day about the many possibilities with your advanced rules, but you'll want to take a look to see for yourself. When you do, you'll see the many conditions that can trigger specific actions for your respondents. You'll find that you can change your headline based on the day of the week, send return visitors to a different page geared toward remarketing, use the referrer URL to assign a grade plus a whole lot more, all available from within your page editor! Below you will find a list of the various conditions and actions that can be combined with each other to create advanced rules:

Conditions

- Browser region
- Converted on this creative
- Converted previously in this campaign
- Converted previously in any campaign
- Day of week
- Domain name
- First time at this point
- Geolocated country (99% accuracy)
- Geolocated region (75% accuracy)
- Geolocated city (70% accuracy)
- Geolocated postal code (60% accuracy)
- Number of visits
- Query String Variable
- Referrer URL
- Respondent cookie
- Respondent data
- Respondent numeric data
- Respondent tag(s)
- Respondent first primary tag
- Respondent second primary tag
- Respondent successfully exported
- Respondent not successfully exported
- Grade
- No conditions required
- Number of actions in creative
- Number of source clicks
- Server scriptlet result
- Time of day
- Traffic source
- User agent string

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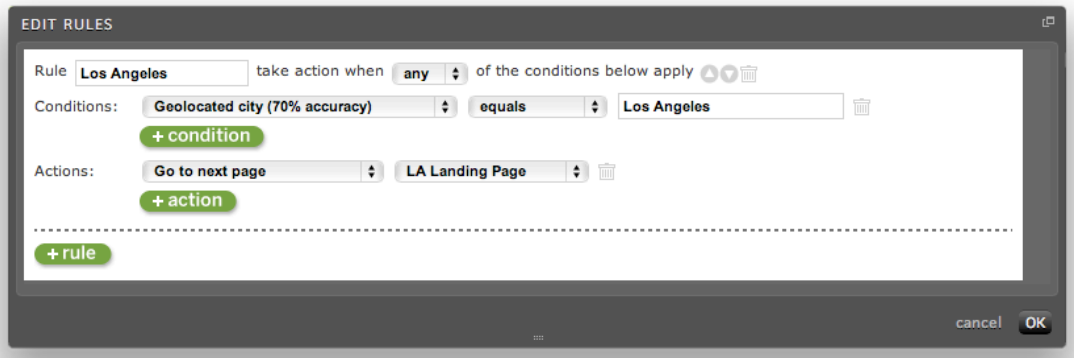
Actions

- Delete respondent data
- Delete all sensitive data now
- Export immediately
- Export immediately (async)
- Go to next page
- Go to external URL
- Go to traffic source
- Go to download file
- Grade as
- Mark as converted
- Mark to be re-exported
- Notify via email
- Run server scriptlet
- Save into database
- Save into database numeric
- Save query string variable
- Save from server scriptlet
- Stop processing rules
- Substitute content element
- Substitute content from user
- Substitute form
- Substitute master page
- Substitute theme (this page)
- Send email to respondent
- Substitute theme (persist)

For example, you can build pages within a single experience that are tailored for specific locations. If you are looking to send respondents from Los Angeles to an LA-specific page, you can set up the following advanced rule.



With this rule in place, all respondents with a Los Angeles IP address will be redirected to the LA landing page which was designed specifically for people from Los Angeles.

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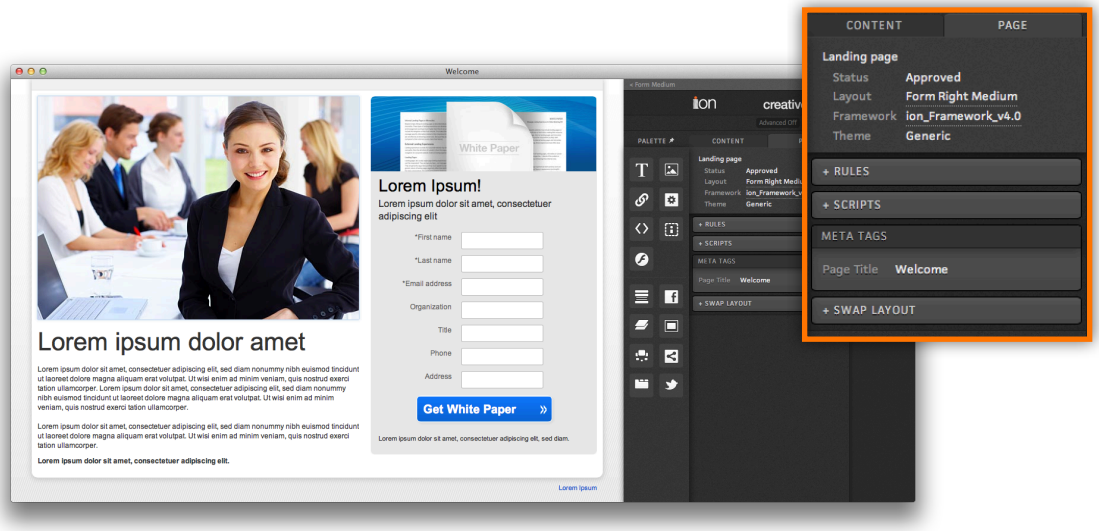
Page Tab: All your creative info, right at your fingertips

The page tab shows key information for the page you are currently viewing. This tab contains the status of a page (whether approved or unapproved), the layout being used, the framework and the theme.

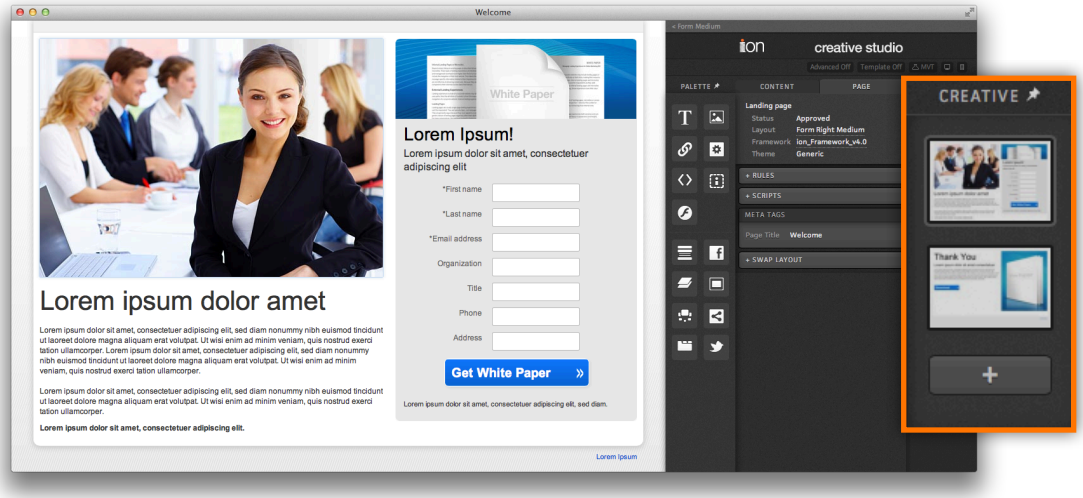
The page tab also shows all the page level rules and scripts. To add or edit a rule, click the '+ RULES' button to open the page rules editor. You can also add page-level scripts by clicking the '+SCRIPTS' button.

Meta tags are also added in the page tab, which can be configured by clicking the '+ META TAGS' section. You can also change the layout of the current page, by clicking on the '+SWAP LAYOUT' button.



Creative Tab: See all your pages without exiting the editor

Your creative tab shows you a thumbnail of every page within the creative. To edit a different page within the creative, simply click the thumbnail of another page to start editing that page! You can also add another page to the creative by clicking the plus sign at the base of the thumbnails.



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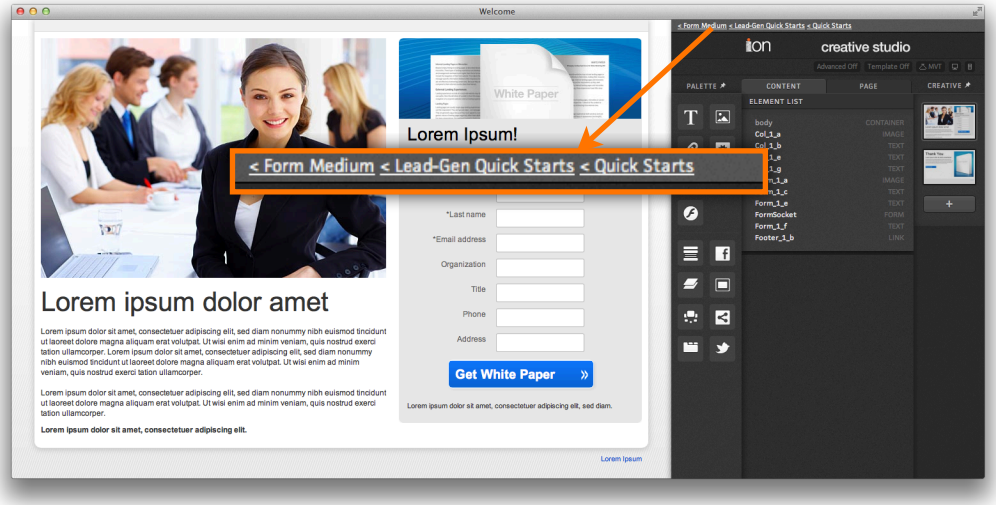
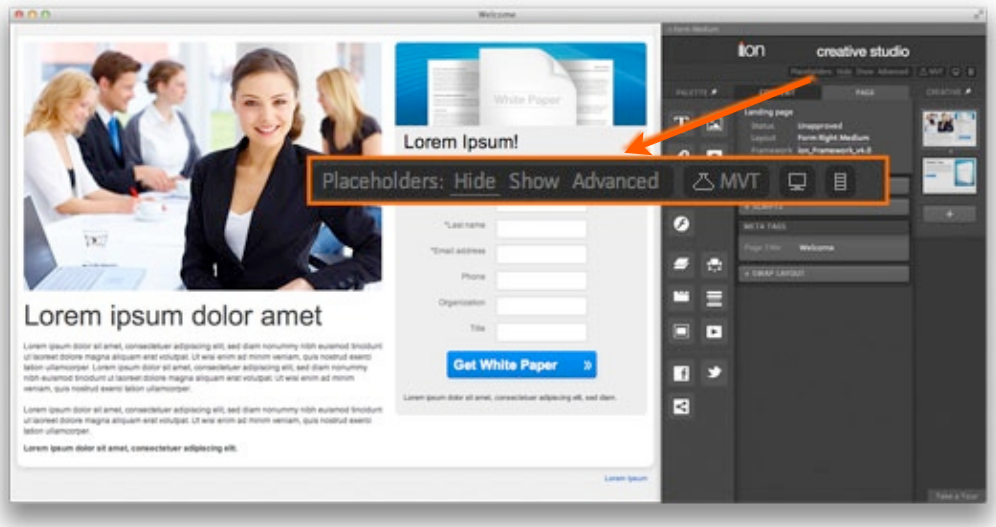
Navigation Bar

At the top of your creative studio, you will find navigation links that can be used to quickly jump back to the creative, campaign or portfolio in which this creative was made.



Status Bar

The status bar, which sits just above the tabs, provides a status of the current page and quick access to common operations. From here, you can toggle the current template mode, see whether a multivariate test is running and/or jump directly into the MVT editor, open a live preview of the page in another tab, or open the creative proof.



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Advanced - More editors!

Looking for even more options? You can click the 'Advanced' button at the top of your creative studio to show more editors! When you click advanced mode is on, you will see tab links appear on your page editor to easily make your creative into a microsite!

As a best practice, you may want to keep advanced mode off (if you are not building a microsite) to help visualize what the page will look like live while adding content.

Template

As you edit your page, you will likely want to check what it looks like if you were to take it live right now to make sure everything is lining up properly. To do so, you may click the 'Template' button at the top of your creative studio. When template mode is on, you will see all of the available editors on the page. When template mode is off, all unused elements will fall off the page and show what your page would look like live, while retaining the ability to edit the elements that are on the page.

MVT

Your status bar also includes an MVT beaker icon to quickly access the ion platform's robust multivariate testing tool. ion's MVT tool is a great way to test multiple elements on your page at the same time. We will discuss the MVT tool in greater detail later on in the manual.

Live Preview

Your creative studio also contains a monitor icon in the top right corner within the status bar. You can click this icon to see a "live preview" of your creative. This will give you the ability to take your creative for a test drive before taking live to make sure all the links go to the right pages and all your content displays and functions as expected.

Proof

You may also view a proof of your page by clicking the list icon on the right side of your status bar. This will open a window that lists all the elements within your entire creative. You may use the proof to quickly scan your entire creative at once to make sure all of the elements of your creative are correct and ready to go live.

Widgets

Some of your layouts will contain specific widget editors which you may use to insert any widget from your widget library or leverage one of our ready-made widgets. You can also use a widget editor to insert an iframe URL or enter code directly into a code block.

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Ready-Made Widgets

When editing a page, you will see icons in the palette tab of your creative studio for our pro ready-made widgets. These widgets were built based on common functionality requests for the ion platform including accordions, lightboxes, rotating images/content, tabbed content and layered content. Drag and drop the icon for the ready-made widget you would like to use to the area where you would like to place it on your page. Ready-made widgets are powerful ways to add interactive content to your pages.

- **Accordion:** Display text, images and links within drop-downs so that respondents can control what content he or she would like to view within your page.
- **Lightbox:** Overlay either an external website or another page from within your creative after clicking a button, image, or link.
- **Rotator:** Rotate images, text and links.
- **Tabbed Content:** Display content within a tabbed environment, much like a microsite, but without changing pages.
- **Layered Content:** Place text and/or links over a single image.
- **Social:** Contains common social marketing widgets like a Facebook Like button, Twitter Tweet, and much more.
- **Video:** Add videos from YouTube, Vimeo, Brightcove and/or Ooyala to your ion pages.

You can also find additional ready-made widgets when you drag the standard widget editor icon onto your page. By clicking the 'select widget type' link at the top of the fly-out, you can then select the ready-made widget tab. From here, you will see specific ready-made widget categories on the left side of the fly-out. Within each category, you will find additional versions of the ready-made widgets listed above.

***Note:** When checking out these categories, you will notice that are separate categories for content rotators and image rotators. Content rotators are more text based, although they may contain images as well, while the image rotators are focused on images, although you can layer text over the rotating images as well.

Change Your Layout

Are you looking to change where the content is displayed on your page? You can change your page's layout by clicking the '+ SWAP LAYOUT' button within the page tab of your creative studio. Your ion console comes loaded with different layouts that can be used to change up the look of your pages, so you will want to take a look at the layouts you have available to find the one that is best for your content.

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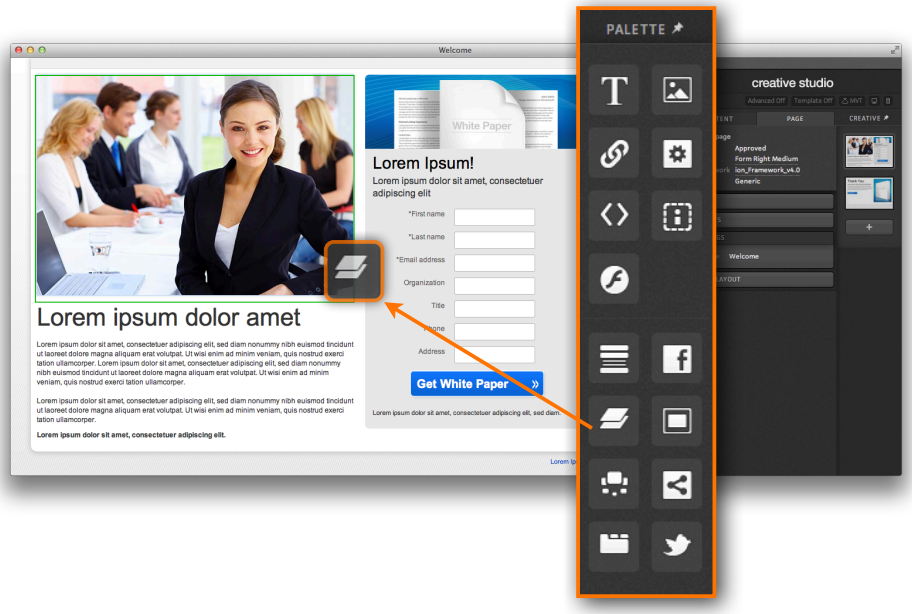
Drag & Drop to Rearrange Your Page

ion page templates are extremely flexible and enable you to drag and drop content areas around the page without code. For example, you can change a text block to be an image. Or an image to be a link. Or a link to be a widget! You can even drag and drop dynamic page elements into and around your page.

To swap an element, click on the icon of the element in your creative studio and drag it to the area where you would like to use it. That element will replace then replace the original.

If the element you want is already on your page, you can click and drag that element to another area of your page. It will then change places with the element you have dragged it on to.



***NOTE**: Forms cannot be swapped for other elements or moved within a template. To change the location of a form, change the layout by click the '+ SWAP LAYOUT' button in the page tab of your creative studio, and select a template that has the form located where you want it to be on the page.

Scripts

Any script that has been uploaded to your global script library can be pulled into your page through the page editor. Within the page tab of your creative studio, you will see a '+ SCRIPTS' button. Simply click this button to find options to pull in scripts in the <head>, <form>, closing </body> tags as well as a few other more advanced options to trigger scripts upon page onload, unonload and form submission.

Server Scriptlets

Custom Javascript can be used to enhance the functionality and combine complex sets of ion advanced rules into a centralized, reusable script. We call them "scriptlets" and they can be added to the ion platform under the global Integration menu and the server scriptlets menu item. ion advanced rules are used to run the scriptlet and base actions off of the scriptlet's results.

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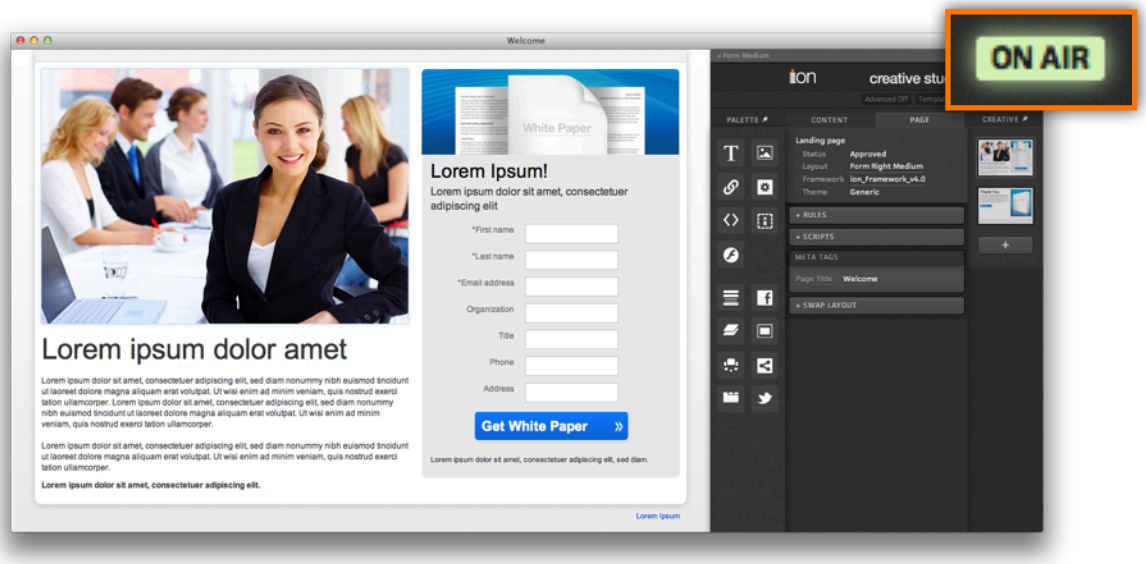
The power behind scriptlets is that you can write code for advanced, custom logic on your pages, store it centrally then plug it into creatives as needed!

Meta Tags

From within the page tab of your creative studio, you will find a button to edit your meta tags. You can click this button to change the title of your page that is displayed at the top of your browser window. You will also find additional options for meta data including description, keywords and a canonical URL for SEO purposes.

ON AIR Indicator

An 'ON AIR' indicator, located directly to the right of the creative studio logo, will be shown if the current creative is engaged and assigned to at least one open traffic source.



Going Live (Open a Traffic Source)

Now that your pages are proofed and ready to go, it's time to create a URL to take your creative live.

Understanding URLs (Traffic Sources)

One of the most flexible things about the ion platform is the way that it handles URLs and testing.

ion pages are typically shown on a subdomain of your website's root domain. For example, ion's root domain name is ioninteractive.com and our landing pages live in ion at paths.ioninteractive.com. In your platform you will create specific, trackable URLs on your subdomain that you then place in your ads or emails.

In the ion platform we call URLs "traffic sources". A traffic source (URL) is separate from any creatives until you associate them in the traffic source management screen. You control what gets served to any URL using the traffic source management screen. You just associate a creative (or set of creatives if you are running A/B tests on a traffic source URL) to your traffic source URL.

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That means a single URL can be used over and over again for multiple waves of testing — making it easier for you to distribute URLs once and change creatives and tests behind that URL as often as you wish.

Traffic source = A unique URL you have created in the ion platform. Create as many as you want!

Steps to Take your Creative(s) Live (Launch!)

The steps below cover how to open a traffic source in the ion platform, which results in a live, destination URL that you can direct traffic to.

Before you begin:

- Make sure the creative(s) you want to take live are set to engaged. On the creative management screen, select 'Engaged' from the mode drop-down in the upper area of the screen, and hit the blue refresh button. Do this for each creative you want to launch.
- Make sure you have set up at least one sub-domain in your domain manager. This is the root of the URL you will be creating to go live in the traffic sources section of your campaign.
    - Navigate to Settings > Manage Domains to set up your domains and subdomains. Search for "Manage Domains" here in the support section for more information on how to do this.

All right, let's go live!

1. Start at the campaign management screen, where you should see a list of all your creatives and your engaged creatives should be green, which means they are ready to be launched.

2. Click on the 'traffic sources' tab then the green plus sign to add a new traffic source.

3. Create your traffic source URL by selecting the subdomain you'd like to use (if you have multiple sub-domains set up and pointed toward your ion console) and create your "friendly address". The friendly address is the extension added to the subdomain and must be unique (within the subdomain).

    a. For example, the subdomain ion uses for our ion console is *paths.ioninteractive.com*. If we were creating a URL for a PPC campaign, we might create something like: *paths.ioninteractive.com/PPCcampaignname*

4. From the category and sub-category drop-downs, let ion know where you are driving your traffic from. The categories are pre-defined in the ion platform, so select the one that best describes your traffic. This categorization is only used for reporting in some of the gauges and will not impact anything. Then select a sub-category, or create your own in the field provided.

5. Click on a creative thumbnail to associate the creative to the traffic source URL. When you click save, your URL will be live and the creative will be associated with it.

6. **YOU ARE LIVE!** The friendly URL you just created is now live (ready for you to send traffic to it!), and the creative you associated in the previous screen will be shown to any visitors who arrive at that traffic source URL. You are now on the traffic source management screen where you can add additional creatives to the URL, to create an A/B test if you wish.

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Best Practices For Going Live

General Proofing/Review Concepts

The ion platform gives you several ways to review your creatives for proper spelling/grammar, consistent messaging/branding and functionality, prior to going live.

- Use the creative ‘Proof’ feature for line by line review of third-party scripts, content and advanced rules/conditional logic. You can access the ‘Proof’ button on the Creative Management screen.
- The preview feature allows for advanced respondent simulation of your landing page "experience". We recommend using the preview function for reviewing the user experience and conditional logic triggered by query parameters, previous behaviors, location, browser, etc. Preview is the best way to go through an experience to review and proof it because it simulates the exact experience a visitor will have when they come to your live pages.
- Often, end-to-end testing of data exports or third-party tracking is required. Set up of a "sandbox" portfolio is suggested as a best practice for end-to-end testing on live pages — this ensures A/B test results are tracked separately from any live proofing/review traffic. See below for more information on setting up a "sandbox" portfolio.

Preview your Creative

The ion platform includes a “preview" mode where you can view a creative exactly as a user will see it and simulate various scenarios (for example, how the page will appear for a mobile user or for a certain browser).

From the creative management screen, you can click the blue 'Preview' button. When using preview from the creative management screen you will be able to fully simulate the browsing and clicking, just as a user will experience it. You can also "preview" from any page within a creative to see just a single page.

If you distribute a preview link to other people inside your organization keep in mind they will need a user account to log into the ion platform to view the preview.

Reviewing/Proofing Pages in a "Sandbox"

Many customers like to take a page live in a “sandbox” and run through a complete proof before officially launching their pages. For this sort of “sandbox” testing, we recommend copying the creative you want to review into a sandbox portfolio and campaign (set one up if you don't already have one created. Just ‘+portfolio’ from the portfolio screen, then ‘+campaign’). You can set up a traffic source and take your creative(s) live in the sandbox portfolio.

Anyone who goes to the traffic source URLs you create in the sandbox portfolio will be on a live page and will be tracked as a live respondent. When you have completed your review you can navigate back to the portfolio/campaign where the original creative was copied from, and take it live. Using the sandbox portfolio prevents a real A/B test on a traffic source results from being skewed.

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Before you go live…a checklist:

Remember to review your "go live" checklist! Don't have one yet? Use the general checklist below to help guide the customization of your own.

- Brand consistency
- Messaging
- Functionality
- Browser compatibility (if you've created custom templates in the ion platform)
- Page titles/meta data
- Third-party tracking codes/scripts as expected
- Third-party integration is working as expected
- Copy/grammar/spelling
- Behavioral tagging on page elements
- Advanced logic/rules
- External conversion tracking (if applicable)

Testing

Testing is a great way to ensure your creatives are always improving. The ion platform gives you the ability to test different versions of your landing pages either through split tests or multivariate tests. In this section, we will discuss how to quickly get your tests up and running.

Get Started with A/B Testing

The ion platform enables you to split test (A/B test) any number of creatives (landing pages) on any of your ion URLs. You will create a URL (an ion traffic source) and associate any creatives you want to test to the URL. Then ion will distribute the incoming traffic across those creatives in your test group.

Here's how to launch an A/B test.

Before you Begin

- It's a best practice to start with a test plan — know what you want to test and why. If you are new to testing, you can download a copy of ion's "Guide to Online Testing" for more information on formulating your test strategy.

Let's Get Started!

1. Engage your creatives

To begin A/B testing, you will need to have two or more engaged creatives within a single campaign. Once you have your creatives ready, setting up the actual A/B test only takes about one minute! It's that easy, just follow these instructions for opening a traffic source and splitting your traffic across your creative variations.

   a. Navigate to the creative management screen for each creative and click the drop-down in the top right corner labeled "MODE"

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b. Select “Engaged” from the drop-down menu and then click the blue refresh button immediately to the right

c. The pages within this creative should now be highlighted in green

2. Open a traffic source

Now that you have two or more engaged creatives, you may follow the steps outlined in the previous section to open a new traffic source.

3. Split your traffic

After creating your traffic source, you will be taken to the traffic source management screen. If you would like to set up a split on a traffic source that already exists, simply navigate into the corresponding traffic source management screen. From here, you will be able to set up your URL to split traffic between multiple engaged creatives.

a. To the left of each creative in the traffic source management screen, you will notice sliders for each creative.

Note: These are weighted sliders that will split traffic based on the weighted sliders.

b. To split traffic, move the slider to the right for a creative that is not set to receive traffic from your URL.

Note: Only creatives highlighted in green are set to receive traffic from your URL.

c. If your sliders are all in the same position, then traffic will split evenly across the green creatives

i. You can have your traffic split in any way you would like

ii. The percentage of traffic for each creative is represented in a pie graph labeled ‘Traffic allocation’ to the right of the list of creatives

d. Once your sliders have been set as you would like, any traffic that lands on this URL will be split as specified by your sliders

i. Behind your single traffic source URL, you can route the traffic across as many creative variations as you wish

4. Auto-optimization

The ion platform allows you to automatically optimize, by sending traffic to your winning creative once statistical significance is reached, or you can manually monitor your test results without auto-optimization.

a. In the top right corner of the traffic source management screen, you will see a button displaying the word “automatic” just below the word “OPTIMIZATION”

b. By default, the ion platform will automatically find the better performing creative and remove the lesser performing creative from the traffic split

c. The ion platform determines which creative is performing better based on a statistical confidence interval that is set in the “Configure Site” screen

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d. If you would like to manually control when a creative is removed from the test, simply click the button below "OPTIMIZATION" and it will switch over to "manual"

Get Started with Multivariate Testing (MVT)

In addition to being able to setup split tests, the ion platform also gives you the ability to setup multivariate tests for any number of page variables (headlines, images, forms, buttons, etc) on any of your ion pages.

Before you begin

- You should be familiar with (1) creating landing experiences in the ion platform and (2) how to open a traffic source (going live).
- You should be familiar with multivariate testing. Search the web for articles and information on multivariate testing concepts.
- It's a best practice to start with a test plan — know what you want to test and why. If you are new to testing, you can download a copy of ion's "Guide to Online Testing" for more information on formulating your test strategy.

Let's Get Started!

To get started, click into the creative you are ready to set up an MVT experiment on. In the bottom, left corner of your page thumbnails you'll find a beaker icon. An empty beaker indicates an experiment is not set up. A green, full beaker indicates a live MVT experiment is running. A yellow beaker indicates a paused experiment. Click over the beaker to open up your MVT editor.

You'll land on your variations tab where you'll find each element on your page. Click on the green plus sign beside the element you'd like to get started with. You'll find that the content, image, form and link editors function the same way as they do right on your template. The element area will pre-populate with the original content and you can replace it to add a new element. Add as many element variations as you wish.

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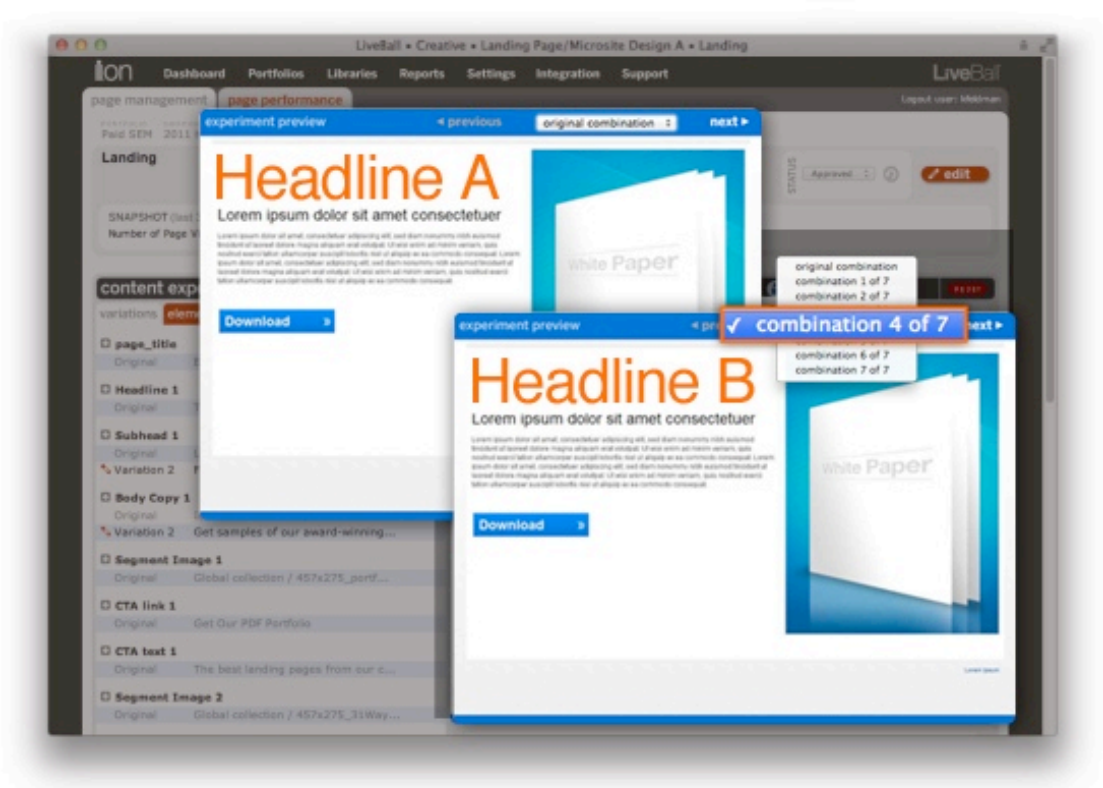
Add variations for each element you'd like to include in your experiment. To the right, you can preview each combination that has resulted from the variations you've created. The more combinations you've created, the longer it will take to achieve a winning combination. If you click over the preview of a combination, you'll be able to see a larger, full-page view of the combination you are previewing.

There is an estimated experiment duration calculator available as well. You can input the pages average daily views and the ion platform will calculate an estimated duration. The more traffic you receive and the greater difference between the elements you are testing, the sooner you will see results.

When you're ready to launch your experiment, click on the play button beside the status bar. Your experiment's status will switch from designing to running.

You have two options when running an experiment—manual or automatic optimization. By selecting manual optimization you're electing to monitor your results yourself. This means that you'll take combinations out of rotation as well as apply the winning combination to the page. By selecting automatic optimization the ion platform will retire combinations that are not winning when statistical significance is reached.

Now that your experiment is running, you can view your elements and combinations tabs.



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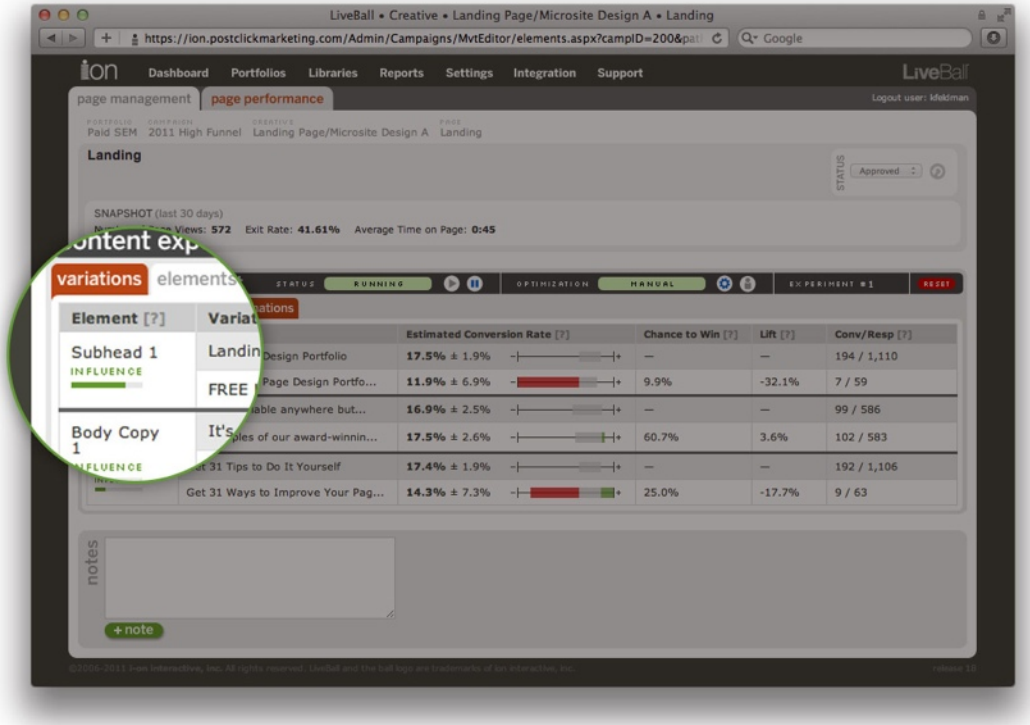
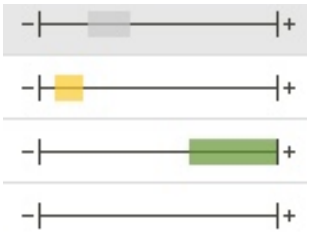
The elements tab displays each element you're testing and the variations of it that you have created. There's an influence bar that indicates the elements influence over conversion performance. In the example below, the headline has a greater influence on conversion results than the subhead.



The variation on the elements tab that is greyed out is the original. You'll be able to see estimated conversion rate, chances to win, lift and conversion rate for the original and each variation. The estimated conversion rate bar is color coded.



- Green means the variation is performing better than the original.
- Yellow indicates confidence has not yet been reached to determine if this variation is performing better than the original or not.
- Grey shows that the variation is performing the same as the original.
- Red indicates this is variation is performing worse than the original.

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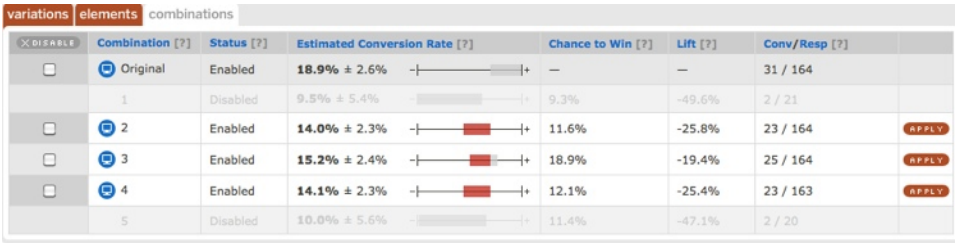
In the example below, there is statistical confidence that the variation is performing worse than the original. There is a margin of error to the right of the estimated conversion rate. The colored bars do not overlap.

The combinations tab displays each combination of elements that is being tested. You can scroll your mouse over the combination for a preview of it. You'll be able to see estimated conversion rate, chances to win, lift and conversion rate for each of these combinations. The color coding works the same way here, except it reflects the prediction for an entire combination against the original page.

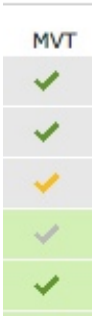
You can manually disable lesser performing combinations here. You can also apply the winning combination to your page here.



If you're using automatic optimization, ion will disable poorly performing combinations for you!

You can pause and reset your experiment any time. If you reset your experiment, the stats of your current experiment will be reset to zero and you can begin a new experiment.

A helpful note: back on your campaign management screen you'll find an MVT column. Green checks in this column indicate a live MVT experiment. Exciting! Yellow checks mean a paused experiment and grey checks indicate an experiment with a status of "designing".



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A Note about Test Duration:
The major factors that determine how long a MVT experiment may need to run are:

- the number of combinations
- the traffic rate (i.e.# of respondents visiting the page per day)
- the original combination's conversion rate
- the expected lift percentage by at least one of the competing combinations
- the console's confidence level all factor into the duration estimate

In general an experience needs to run longer when there:

- are a large # of combinations
- is a small traffic rate
- is a conversion rate that is close to 0% or 100%
- is a small expected lift percentage
- is a large confidence level

Testing Pages Outside of The ion Platform

The ion platform also gives you the ability to test pages that were built outside of your console.
This is a great way to test your new ion pages against a landing page you already have live externally. To test a creative that has been produced in the ion platform against a landing page (your "control") that is located outside of ion, add ion's external tracking script to the 'thank you' or confirmation page of the external page. The script, along with instructions, can be found under Integration > External Sites in your ion console (contact your account manager if you have questions about the external tracking script).

Follow the steps below to get the test set up in the ion platform:

1. Add a new creative to the campaign. You don't need to include content in this creative because it will redirect to your control. Think of this as a placeholder creative — in the next steps you will set up advanced rules that bypass this creative and send visitors directly to your control outside of ion.

2. Click on the rules button in the page editor bar of the creative. Choose the condition 'no conditions required'.

3. Choose the action 'go to external URL'. Type in the URL of the control you would like to test against your ion creative(s).

4. Exit the page and go back to the 'Creative Management' screen; switch the mode from 'design' to 'engaged'. This is now your control creative. When visitors arrive on this page they will be seamlessly directed to your control.

5. You will know the control redirect is working when you click on the blue preview icon, it should take you directly to your control page and bypass the ion creative entirely.

6. Add a traffic source, from the 'Campaign Management' screen, and split traffic between the control and ion creative(s) you wish to test.

7. If you are unsure if your external conversion tracking is working, check with your account manager to run through an end-to-end test.

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Reporting

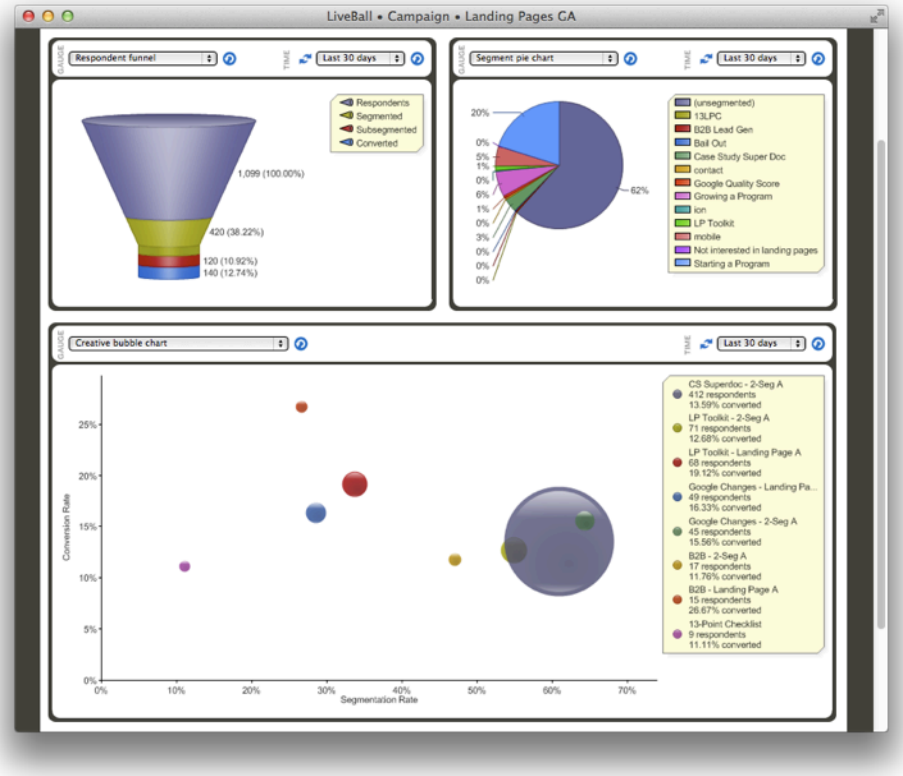
Reporting in the ion platform is provided in two different manners—performance tabs and reports. Your performance tabs can be used to review real-time reporting metrics for any portfolio, campaign, creative or traffic source in your console.

You can also create reports that can be downloaded from your platform and shared with other members of your team. The reports you create can also be automated so they are sent to your inbox on a regular basis.

Performance Tabs

At the top of your portfolio, campaign, creative and traffic source management screens, you will see a tab to review performance metrics at that level. We call each unique performance metric a gauge. While many of the same gauges can be found at all levels, there are also gauges that are specific to each level.

On any performance tab you will typically see three gauge sections—two smaller and one larger. You determine which gauge to display in each section of the page from the drop-down menus available. From within a given performance tab, select the gauge you would like from the gauge drop-down menu and click the blue refresh icon located directly to the right.



You can specify a time period by choosing either one of the pre-set time periods from the available drop-down menu or click the double arrows to enter a custom date range. Once your time period is set, click the blue refresh icon located directly to the right to update your gauge data.

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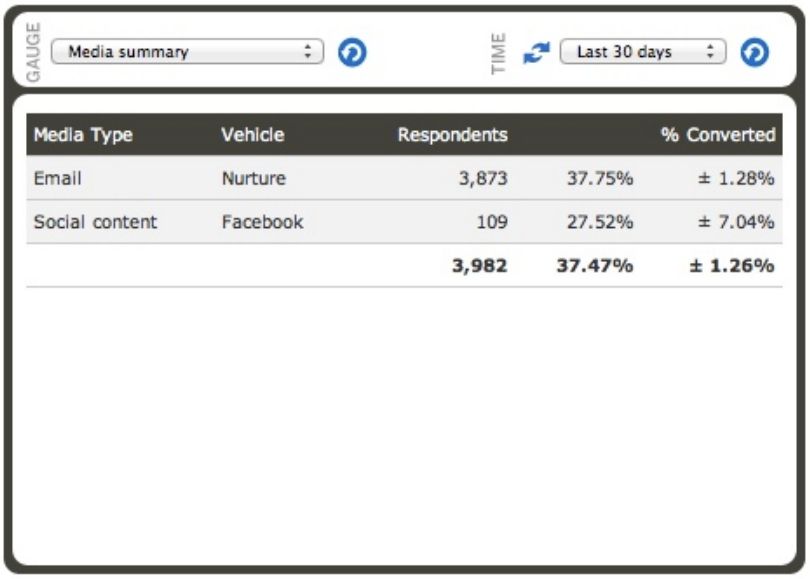
Portfolio Performance

Media Summary:

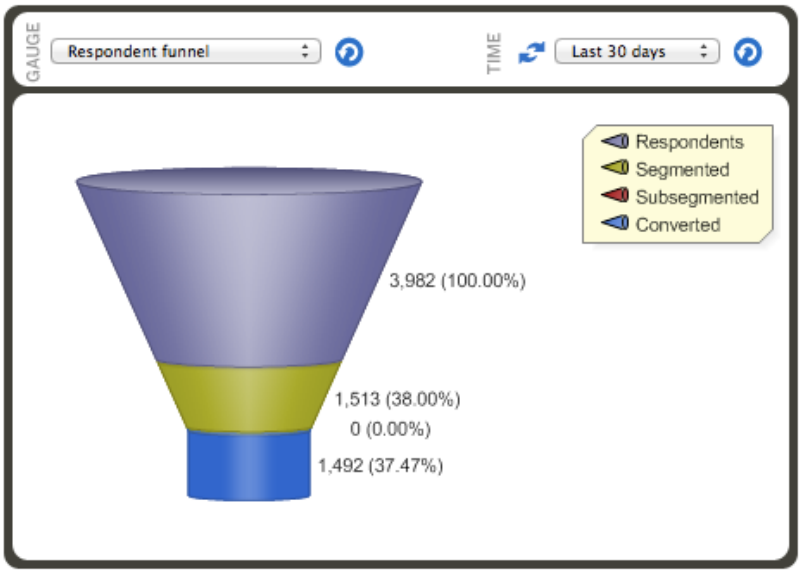
Detailed view of respondent and conversion stats for all media types (e.g., email, banner, search engine) and traffic sources (e.g., newsletter email, website banner, Google) setup in the campaign. Average stats are in bold at the bottom of this list).



Media Type	Vehicle	Respondents		% Converted
Email	Nurture	3,873	37.75%	± 1.28%
Social content	Facebook	109	27.52%	± 7.04%
		3,982	**37.47%**	**± 1.26%**

Respondent Funnel:

Shows you the number and percentage of respondents who have clicked, segmented, subsegmented (if applicable) and converted in the campaign.



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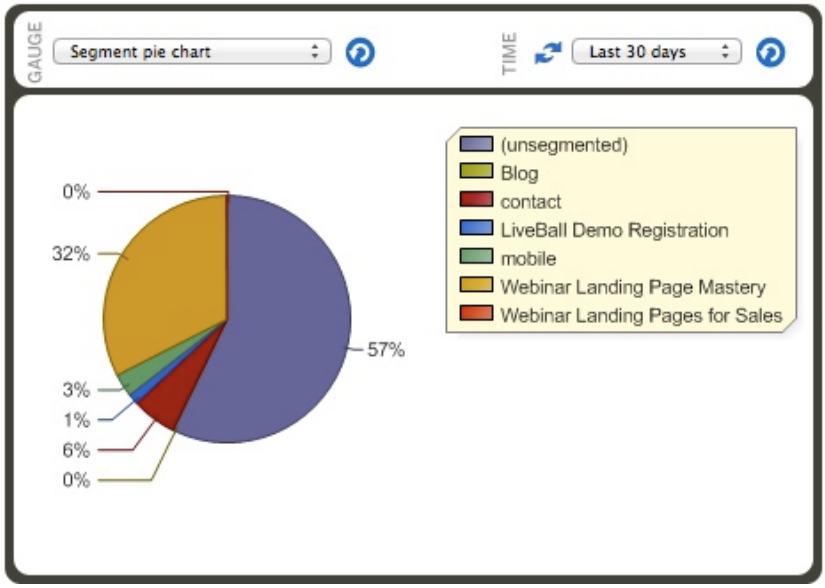
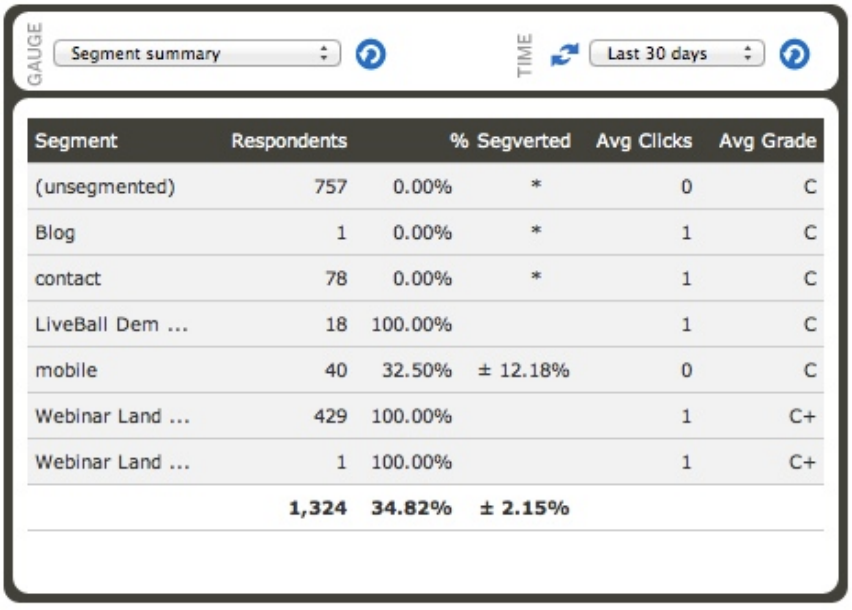
Segment Pie Chart:

Provides a familiar way to view the percentage of respondents per segment, as well as the percentage of unsegmented respondents.



Segment Summary:

A detailed view of the number and percentage of respondents per segment, segversion rate*, average number of clicks and the average grade of the respondents.



Segment	Respondents		% Segverted	Avg Clicks	Avg Grade
(unsegmented)	757	0.00%	*	0	C
Blog	1	0.00%	*	1	C
contact	78	0.00%	*	1	C
LiveBall Dem ...	18	100.00%		1	C
mobile	40	32.50%	± 12.18%	0	C
Webinar Land ...	429	100.00%		1	C+
Webinar Land ...	1	100.00%		1	C+
	1,324	**34.82%**	**± 2.15%**		

* The **segversion rate** is the percentage of segmented respondents who also converted. The +/- percentage denotes (with 80% confidence) that the segment will continue to convert at that rate plus or minus the percentage shown.

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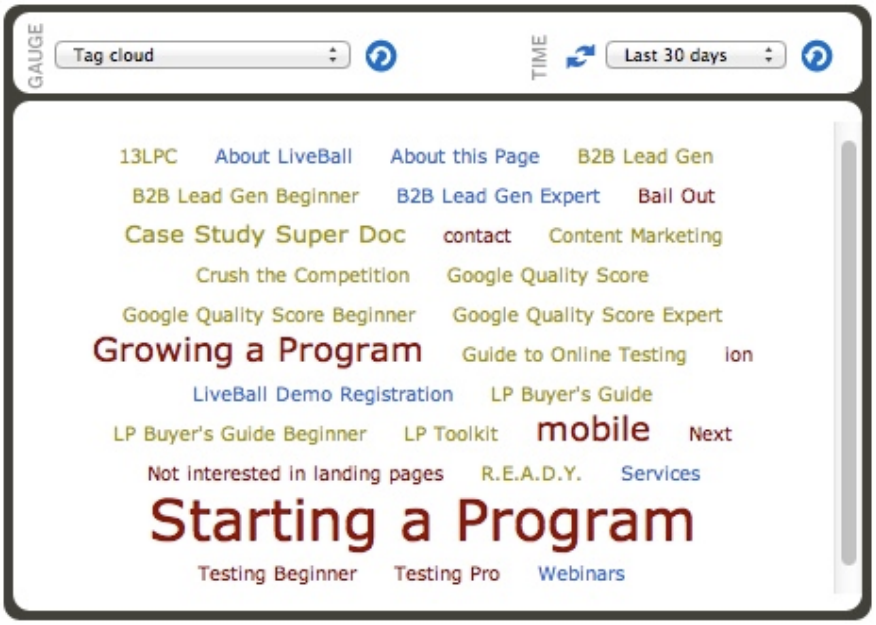
Tag Cloud:

A visual way to quickly see the most popular tags in the campaign. The tag color serves as an indication of how your tags are influencing your conversion rate. The color green is associated with tags that are converting at a higher than average rate. Blue tags are converting at an average rate. And red tags convert at a lower than average rate.

You can hover over a tag name for more detail, including:

- the number and percentage of respondents with the tag;
- the percentage of respondents with the tag who converted;
- the percentage of respondents with the tag where it was their primary tag;
- the percentage of respondents with the tag where it was a pre-conversion tag;
- the conversion influence index (CII) for the tag—an indication of how well that tag performs relative to other tags regarding conversion performance.



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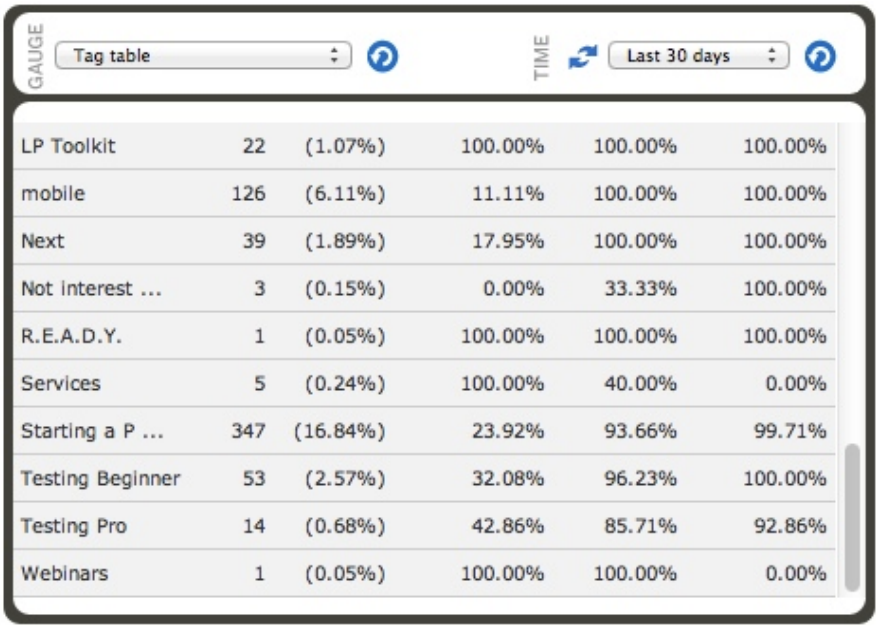
Tag Table:

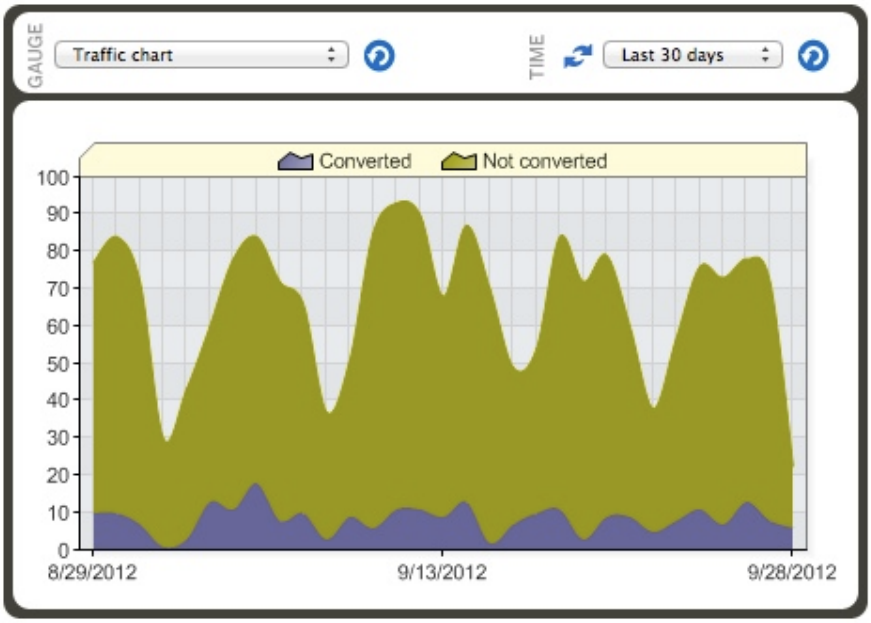
Provides the same data as the tag cloud gauge, but in a table format.



LP Toolkit	22	(1.07%)	100.00%	100.00%	100.00%
mobile	126	(6.11%)	11.11%	100.00%	100.00%
Next	39	(1.89%)	17.95%	100.00%	100.00%
Not interest ...	3	(0.15%)	0.00%	33.33%	100.00%
R.E.A.D.Y.	1	(0.05%)	100.00%	100.00%	100.00%
Services	5	(0.24%)	100.00%	40.00%	0.00%
Starting a P ...	347	(16.84%)	23.92%	93.66%	99.71%
Testing Beginner	53	(2.57%)	32.08%	96.23%	100.00%
Testing Pro	14	(0.68%)	42.86%	85.71%	92.86%
Webinars	1	(0.05%)	100.00%	100.00%	0.00%

Traffic Chart:

Shows the percentage of converted vs. non-converted respondents over the specified time period in an easy-to-read graph format.



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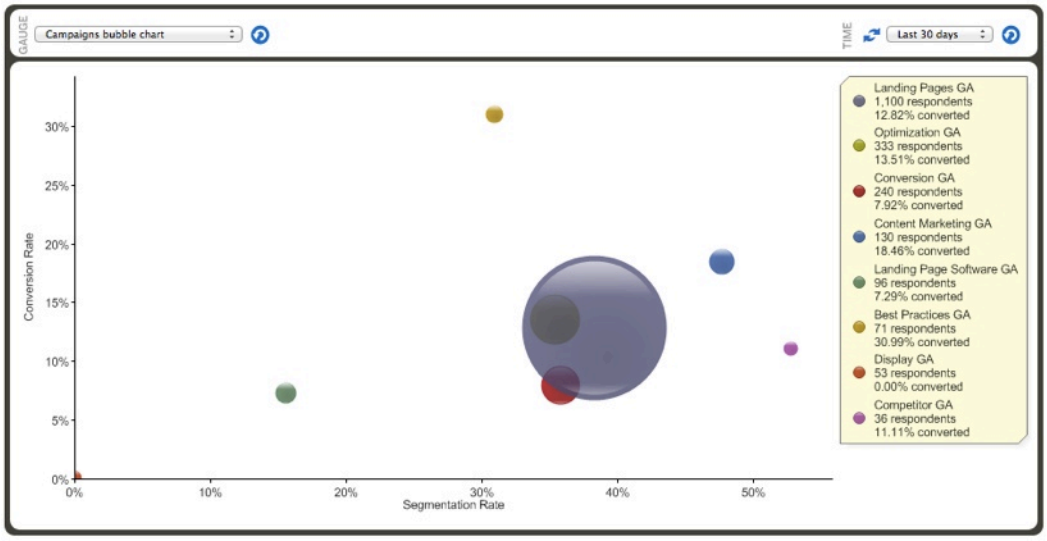
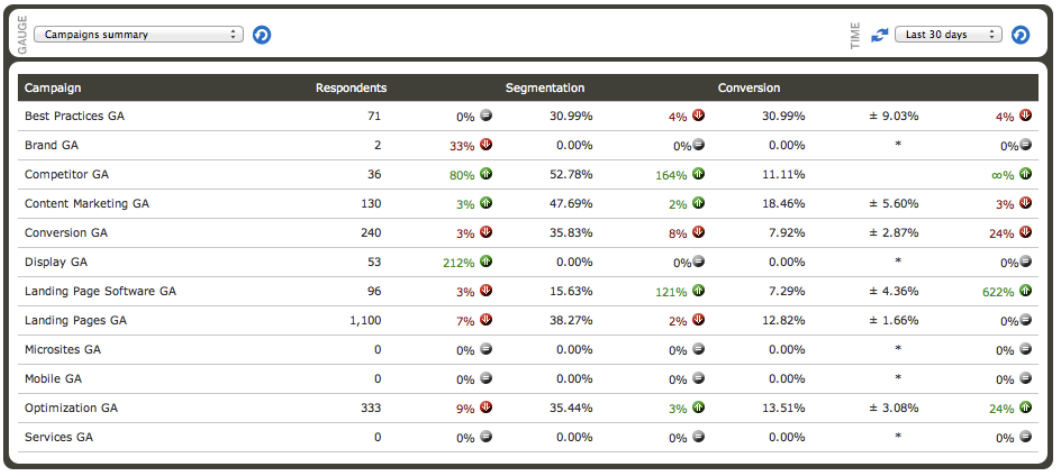
Campaigns Bubble Chart:

Much like the campaigns bubble chart on your dashboard screen, this gauge will show you the top performing campaigns within this specific portfolio.



Campaigns Summary:

This gauge will show you a snapshot of how the campaigns within this portfolio are performing - showing your campaigns' respondents, segmentation and conversion rates for each campaign. You will also see the percent change from the previous period.



Campaign	Respondents		Segmentation		Conversion		
Best Practices GA	71	0%	30.99%	4%	30.99%	± 9.03%	4%
Brand GA	2	33%	0.00%	0%	0.00%	*	0%
Competitor GA	36	80%	52.78%	164%	11.11%		∞%
Content Marketing GA	130	3%	47.69%	2%	18.46%	± 5.60%	3%
Conversion GA	240	3%	35.83%	8%	7.92%	± 2.87%	24%
Display GA	53	212%	0.00%	0%	0.00%	*	0%
Landing Page Software GA	96	3%	15.63%	121%	7.29%	± 4.36%	622%
Landing Pages GA	1,100	7%	38.27%	2%	12.82%	± 1.66%	0%
Microsites GA	0	0%	0.00%	0%	0.00%	*	0%
Mobile GA	0	0%	0.00%	0%	0.00%	*	0%
Optimization GA	333	9%	35.44%	3%	13.51%	± 3.08%	24%
Services GA	0	0%	0.00%	0%	0.00%	*	0%

The green and red arrows show the percentage that the respondents and/or conversion rates have increased or decreased compared to the previous equivalent time period. For example, if the summary is displaying data for 'last 30 days', these rates will be compared to rates 30 days prior to the 'last 30 days'.

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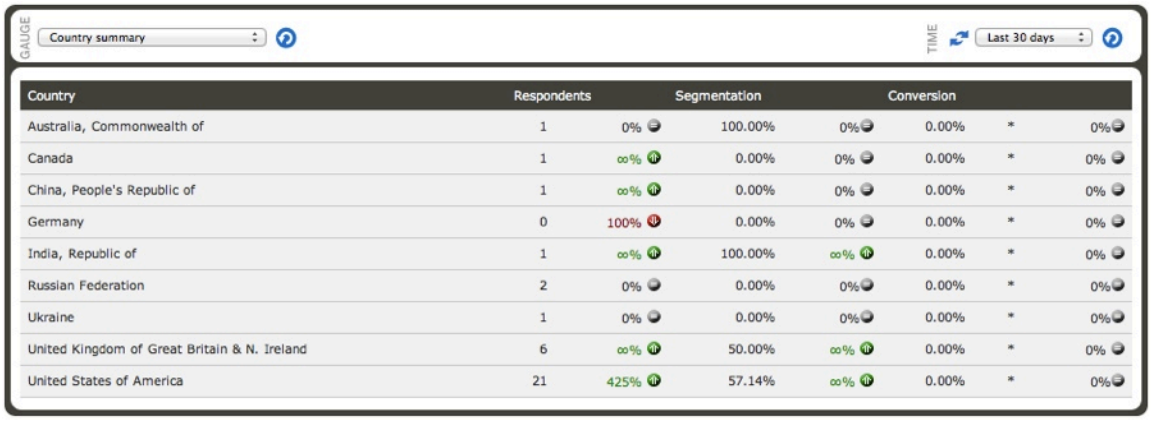
Country Summary:

Shows a breakdown of which countries your respondents are coming from.

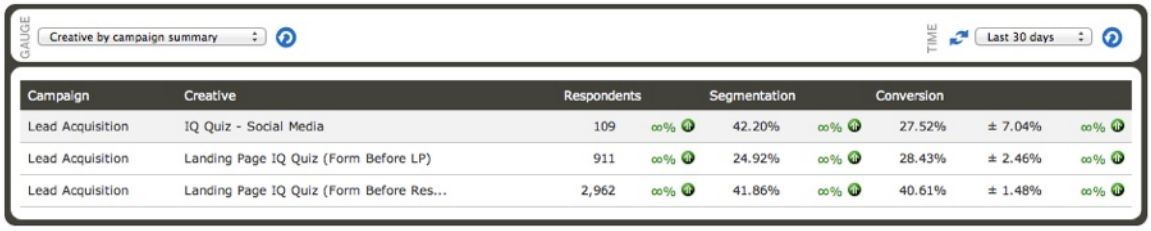


Country	Respondents		Segmentation		Conversion		
Australia, Commonwealth of	1	0%	100.00%	0%	0.00%	*	0%
Canada	1	∞%	0.00%	0%	0.00%	*	0%
China, People's Republic of	1	∞%	0.00%	0%	0.00%	*	0%
Germany	0	100%	0.00%	0%	0.00%	*	0%
India, Republic of	1	∞%	100.00%	∞%	0.00%	*	0%
Russian Federation	2	0%	0.00%	0%	0.00%	*	0%
Ukraine	1	0%	0.00%	0%	0.00%	*	0%
United Kingdom of Great Britain & N. Ireland	6	∞%	50.00%	∞%	0.00%	*	0%
United States of America	21	425%	57.14%	∞%	0.00%	*	0%

Geo-location is determined by respondent IP address.

Creative by Campaign Summary:

Shows a breakdown of the creatives' performance within each campaign for this portfolio.



Campaign	Creative	Respondents		Segmentation		Conversion		
Lead Acquisition	IQ Quiz - Social Media	109	∞%	42.20%	∞%	27.52%	± 7.04%	∞%
Lead Acquisition	Landing Page IQ Quiz (Form Before LP)	911	∞%	24.92%	∞%	28.43%	± 2.46%	∞%
Lead Acquisition	Landing Page IQ Quiz (Form Before Res...	2,962	∞%	41.86%	∞%	40.61%	± 1.48%	∞%

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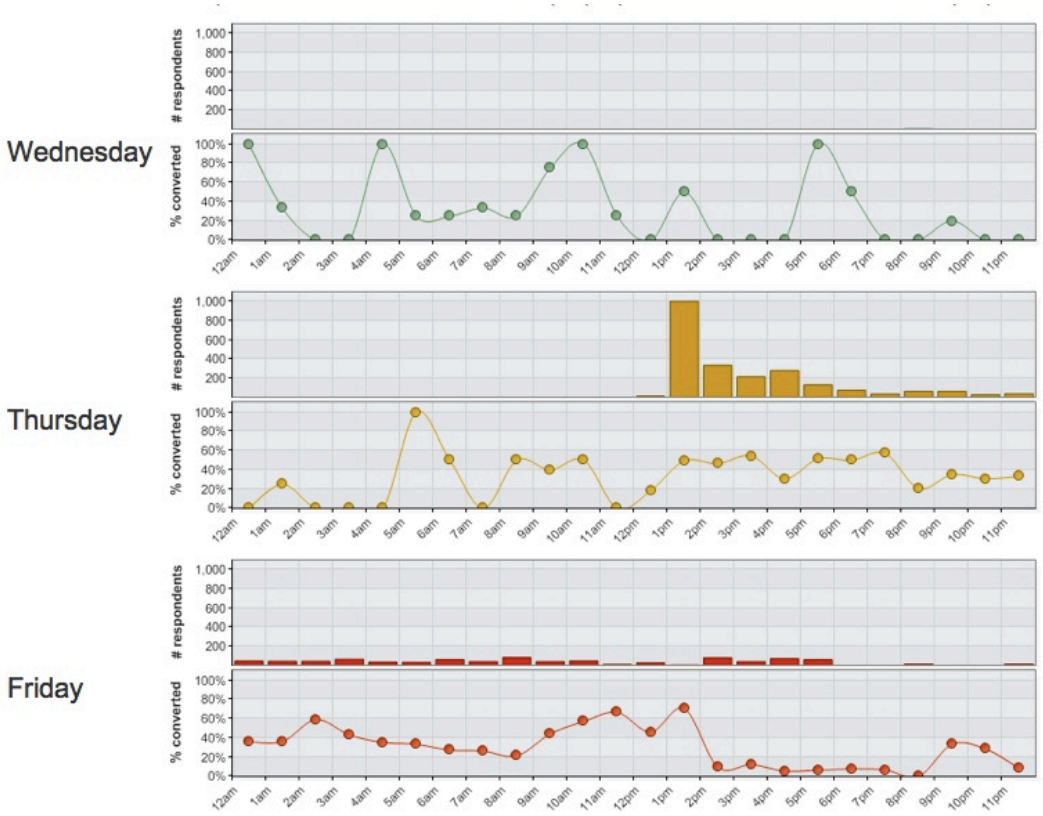
Day-Parting Summary:

Offers a great way to view traffic and conversion trends over the course of a week. This gauge is available on the performance pages for portfolios, campaigns, paths and traffic sources—just select 'Day-parting summary' from the gauge menu for the large gauge at the bottom of the page. It displays both the number of respondents (in a bar graph) and the conversion rate in a line graph for each day of the week, and for each hour of the day during the specified date range.

So, for example, if you specify a 2 week time span, then the values displayed on Monday, 11am will be the combination of respondent and conversion data for all respondents that visited a path on a Monday between 11am and noon (but not including noon). Plus, if you hover over the bars on the respondent bar chart or the circle markers on the conversion line graph, you'll see the # of respondents, segmentation rate and conversion rate for that hour of that weekday.



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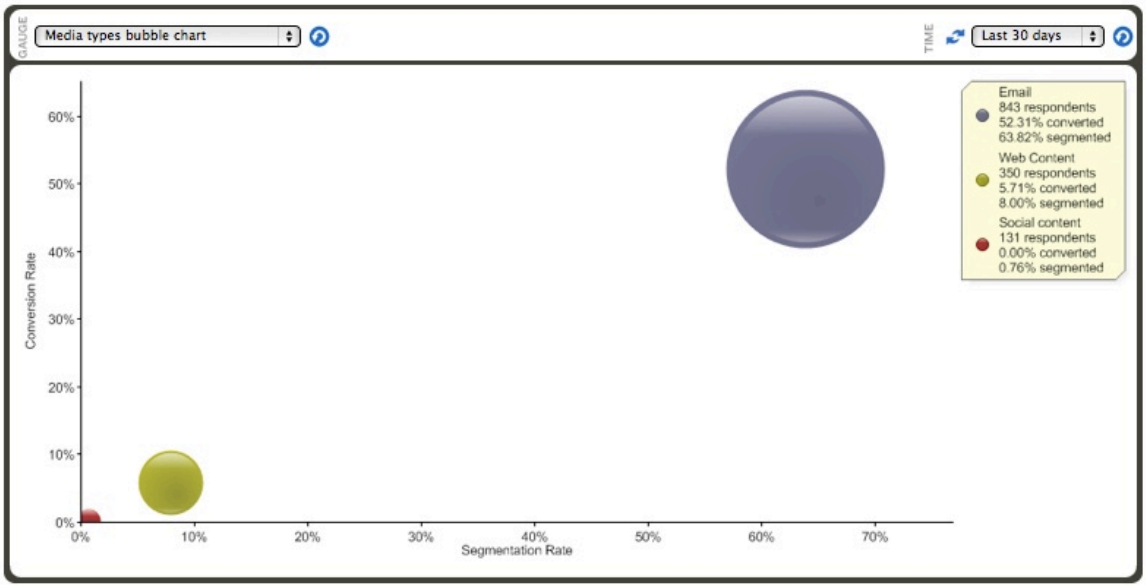
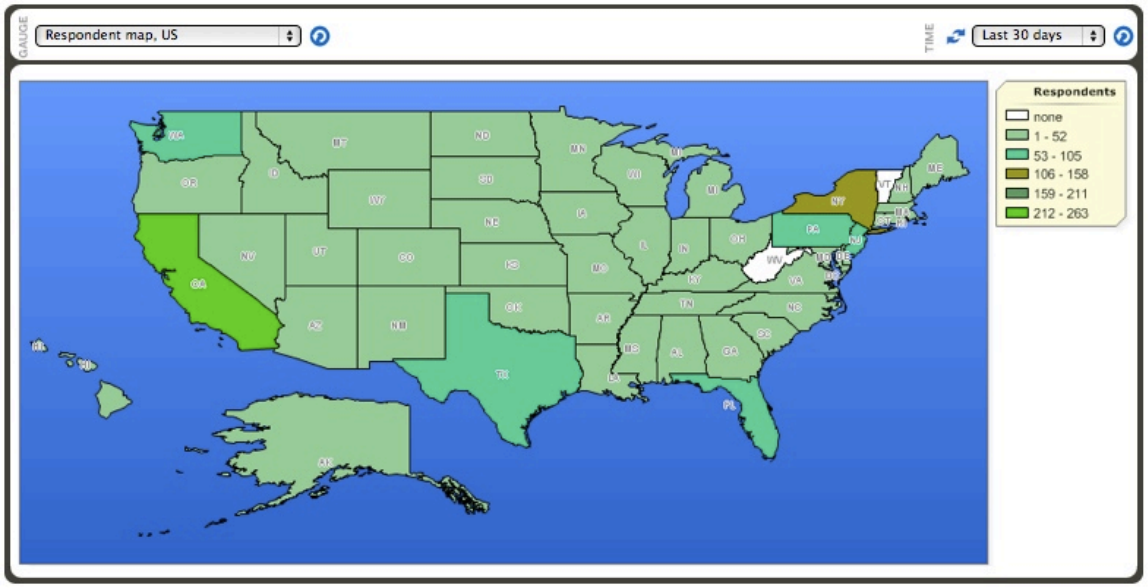
Media Types Bubble Chart:

This chart shows the top performing media types (e.g., email, banner, search engine) in the campaign. The larger the bubble, the more traffic it's received, and the best performing media types will be closest to the top right corner.



Respondent Maps:

Provide a color-coded map view to show the range of respondents by location. Just hover over the color-coded location for more detail, including the region name, number of respondents and conversion rate for that location.



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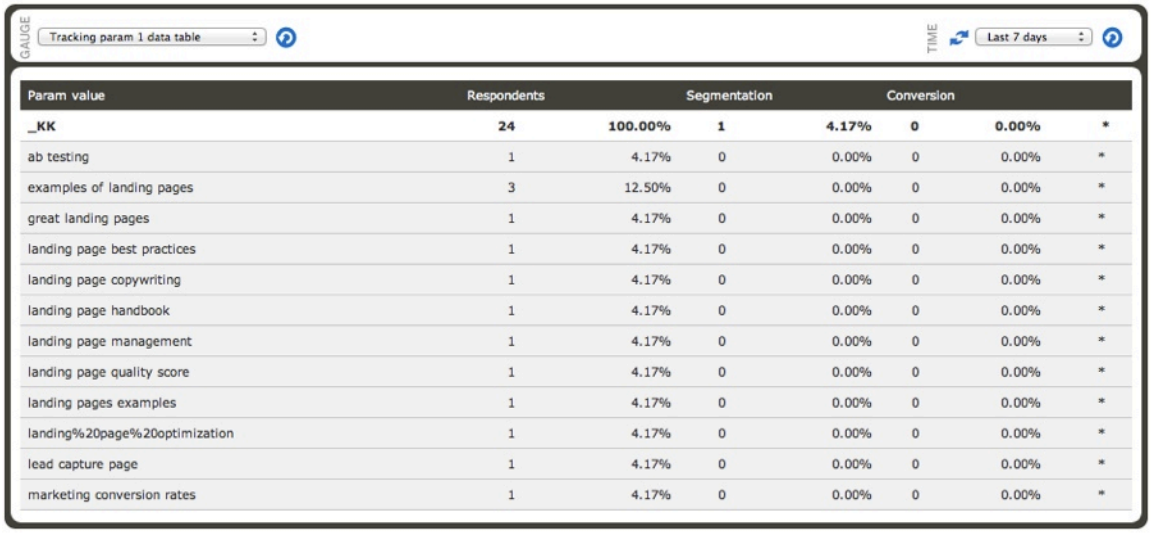
Track Parameters Data Cloud:

A visual representation of query string variables that are being passed into your landing pages. Your track parameters data cloud is color-coded in the same fashion as your tag cloud.

Track Parameters Data Table:

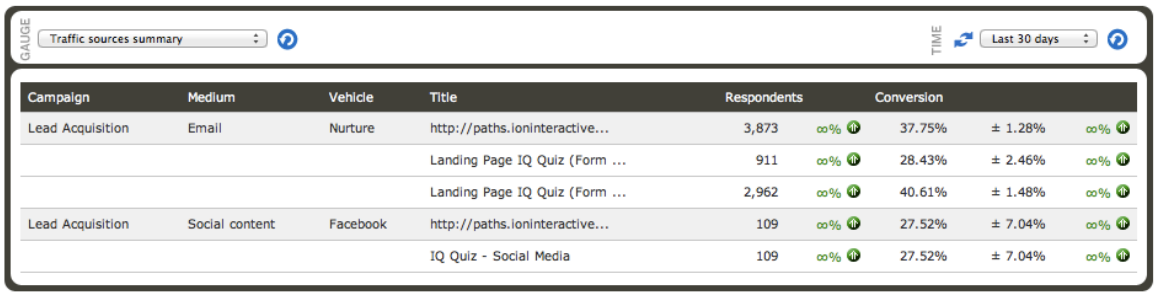
Shows a breakdown of the actual data that goes into the track parameters data cloud



Param value	Respondents		Segmentation		Conversion		
_KK	24	100.00%	1	4.17%	0	0.00%	*
ab testing	1	4.17%	0	0.00%	0	0.00%	*
examples of landing pages	3	12.50%	0	0.00%	0	0.00%	*
great landing pages	1	4.17%	0	0.00%	0	0.00%	*
landing page best practices	1	4.17%	0	0.00%	0	0.00%	*
landing page copywriting	1	4.17%	0	0.00%	0	0.00%	*
landing page handbook	1	4.17%	0	0.00%	0	0.00%	*
landing page management	1	4.17%	0	0.00%	0	0.00%	*
landing page quality score	1	4.17%	0	0.00%	0	0.00%	*
landing pages examples	1	4.17%	0	0.00%	0	0.00%	*
landing%20page%20optimization	1	4.17%	0	0.00%	0	0.00%	*
lead capture page	1	4.17%	0	0.00%	0	0.00%	*
marketing conversion rates	1	4.17%	0	0.00%	0	0.00%	*

Traffic Sources Summary:

A detailed view of respondent and conversion stats (plus margin of error) for each traffic source in the campaign.



Campaign	Medium	Vehicle	Title	Respondents		Conversion		
Lead Acquisition	Email	Nurture	http://paths.ioninteractive...	3,873	∞%	37.75%	± 1.28%	∞%
			Landing Page IQ Quiz (Form ...	911	∞%	28.43%	± 2.46%	∞%
			Landing Page IQ Quiz (Form ...	2,962	∞%	40.61%	± 1.48%	∞%
Lead Acquisition	Social content	Facebook	http://paths.ioninteractive...	109	∞%	27.52%	± 7.04%	∞%
			IQ Quiz - Social Media	109	∞%	27.52%	± 7.04%	∞%

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Campaign Performance

Your campaign performance tab contains many of the same gauges seen in the portfolio performance tab with a few additions.

Creative Bubble Chart:

Similar to your campaigns bubble chart, this gauge displays bubbles for the top performing creatives within this specific campaign.

Traffic Source & Creative Pairs Bubble Chart:

Shows the top performing traffic sources in the campaign and notes the top performing creative in each traffic source. The larger the bubble, the more traffic it's received, and the best performing traffic sources will be closest to the top right corner. To view more performance details from any of these traffic sources, just click on the bubble or in the key at the right.

Traffic Sources Bubble Chart:

Shows bubbles for the top performing traffic sources within this specific campaign.

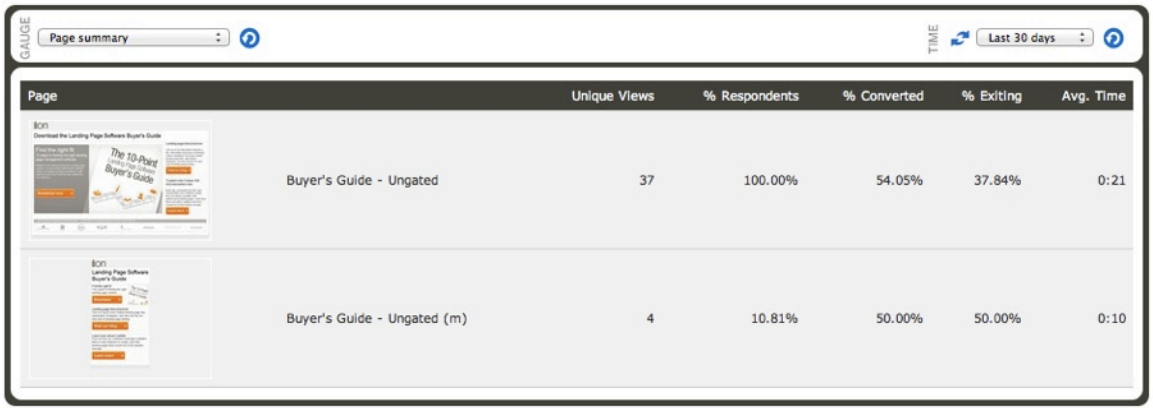
Creative Performance Tab

From this performance tab, you will again see some familiar faces, however, there are fewer gauges in general at this level as it is more granular in nature than the previous levels.

Click the thumbnails of each page to go to a page performance tab. From here, you can see a traffic flow chart, segment pie chart and page element summary for the specific page for which you are reviewing performance metrics.

Page Summary:

This gauge is only available at the creative level. It shows a breakdown of unique views to each specific page within your creative. You will also see the percent of the total respondents who viewed each page, the percentage of people who convert after seeing that page, the percentage of respondents who exit your creative after viewing a given page as well as the average time each respondent spends on a given page.



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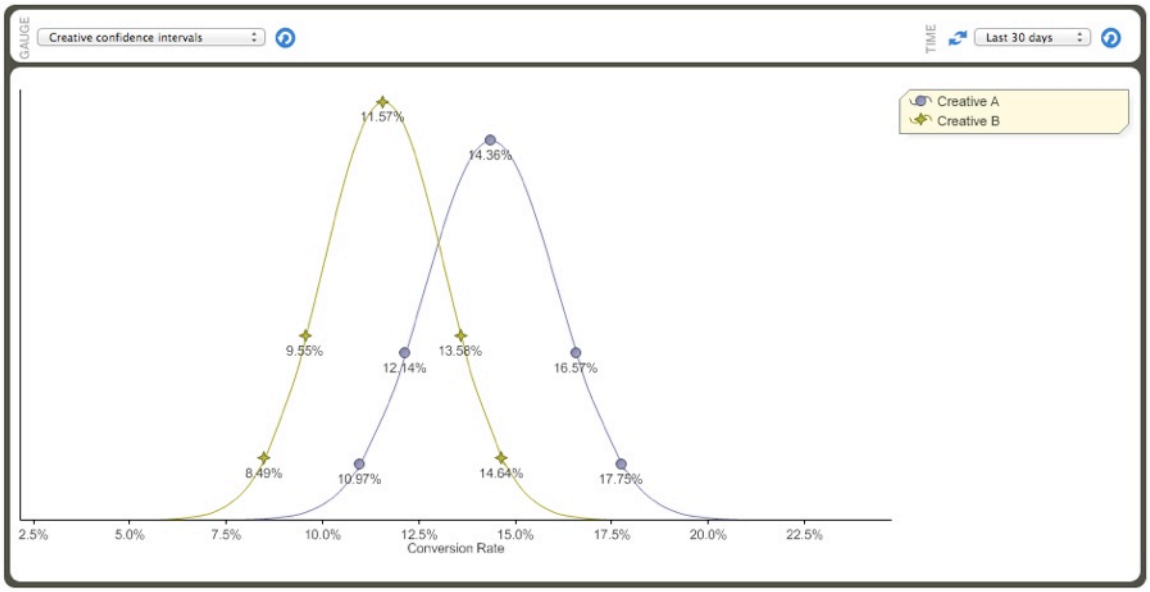
Traffic Source Performance Tab

The traffic source performance tab also has many of the gauges we have discussed so far with one addition.

Creative Confidence Intervals:

The ion confidence interval gauge will help you understand the statistical confidence of your A/B tests and when your A/B test has reached a test winner. You can use automatic optimization to allow the ion platform to automatically recognize when your test has a winner or you can use the creative confidence interval gauge to monitor your test and declare a winner manually.



Tracking Test Performance

To find the creative confidence intervals gauge, navigate into your test's traffic source performance tab. In the bottom half of the page, select "Creative confidence intervals" then click the blue refresh icon directly to the right. Next, enter a date range that reflects when the test started. Once the appropriate gauge and date range has been selected, you should see a graph similar to the one seen below which demonstrates the current statistical data of an A/B test.

Have you set your testing statistical significance level? Hover over the 'Settings' tab and select 'Configure Site.' At the bottom of this page, you will see a drop-down menu for statistical confidence. Select your preferred confidence level and click save.

Each line represents a creative that was live during that date range. Use each point on the curve to analyze your test performance. The point at the top of each curve represents the mean conversion rate of the creative. In the example above, the mean conversion rate, is higher for Creative A (14.36%), and is performing better as a trend.

Moving down a given curve, you will notice additional points. Because the ion platform uses binomial distribution, the points on the left and right side of a given curve represent the same level of confidence with the space in between representing the margin of error. The first point on either side of a given curve represents 80% confidence and the next point represents 95% confidence.

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Once the lower-bound point of a given curve passes the upper-bound point of the other, a winner of the test can be declared at that level of confidence. For instance, if Creative B's lower-bound point at 80% confidence passes the upper-bound point at 80% confidence for Creative A, Creative B can be declared the test winner.

Reports

In addition to the many gauges available within your performance tabs, the ion platform also gives you the ability to run reports that can be saved and automatically sent to your inbox!

To get started, click the reports tab at the top of your screen. Next, you can click the green '+report' button to create a new report. From here, you may select the scope (i.e. system-wide, portfolio, campaign, creative, or traffic source) of the report you are looking to run. Next, choose one of the following report types:

- **Summary**: A handy PDF format that shows a compilation of key performance gauges and charts from your ion console.
- **Source & Creative Drilldown:** Formatted for Excel, this report includes multiple tabs to see respondent, segmentation and conversion data by traffic sources and path, starting with a summary tab. Plus an extra perk—you can view stats of specific tags and/or data fields.
- **Suspicious Clicks:** Also formatted for Excel, this report identifies clicks from web crawlers or bots that may warrant further investigation.

Once your report scope and type is selected, you can choose any of the time periods available within the corresponding drop-down menu or enter a custom date range.

Before you click run though, you also have the option to save the report and have it automatically sent to your inbox. To do so, simply give your report a title, select how often you would like the report to be generated and delivered to you, and enter your name and email address. You can also click the '+email' button to add more people to the distribution list of this report. When you click save, this report will be sent to you automatically with your settings.

When you click run, you will see your report displayed on the next page. At the top of the page, you will see a blue refresh icon that you can click to download the report as either a PDF or Excel spreadsheet, depending on the type of report you are running.

Suspicious Clicks

While the 'Summary' and 'Source & Creative Drilldown' reports are fairly straightforward, you may be wondering:

What are suspicious clicks?

Suspicious clicks are typically generated by non-human visitors to your pages. These 'respondents' may come from search engines bots & spiders like Google or Bing who need to periodically crawl your creatives for quality score as well as pings from other bots on the Internet.

Because these pings are treated as unique respondents to your ion pages, they will dilute your conversion rate and may also cause you to go over your ion capacity. Although most bots cannot be automatically recognized, you do have the ability to remove these clicks from your console.

How does ion identify suspicious clicks?

The first time a respondent clicks on an ion traffic source, the ion platform records the time and date of their "first contact". An invisible <img> pixel is included at the bottom of the initial page of the creative. When ion hears the request for that <img>, it

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updates the "last contact" timestamp for that respondent. A respondent is considered "suspicious" if they requested an initial page on an ion creative, but then they never fully load the page.

There are two common explanations for this:

- The respondent arrived at the traffic source URL with no intention of loading the entire page -- they were (a) clicking on ads just to rack up charges for the advertiser, (b) clicking on affiliate links to rack up rewards, or (c) running an unauthorized "bot" that's scanning pages without loading all the associated resources (i.e., <img> tags). This is generally unwanted traffic.
- The respondent arrived at the traffic source URL "honestly," with no ill intent, but they decided to bounce before the landing page loaded completely. This can become more common in scenarios where the page takes more time to load: (a) the page has lots of Javascript or image assets, (b) the respondent has a slow Internet connection, or (c) both. This may be more pronounced in markets such as China where connection speeds can vary significantly.

You have the ability to delete suspicious clicks from your console under the global Settings menu and the 'Manage Capacity' menu item. You can plug the IP addresses from your suspicious clicks report into the 'Delete by IP' field.

Suspicious clicks report

One of your best tools to identifying suspicious click data from your console is the suspicious clicks report. You may manually run a suspicious clicks report each month or automate the report and have it sent directly to your inbox on a regular basis. This report will display relevant data that can be used to delete these clicks from your console.

Setting up IP restrictions

Once the suspicious clicks have been identified through your suspicious clicks report, you may set up IP restrictions to ensure these specific IP addresses are automatically removed from your console. To set up an IP restriction, please follow the below steps:

1. Hover over the Settings tab and select ‘Manage IP Restrictions’
2. Click ‘+IP’
3. Enter one of the IP addresses from your suspicious clicks report into the available text box
4. Select one of the following options from the ‘Restriction’ drop-down menu
    a. Allow but auto-delete tracking hourly: allows the IP address to visit your creatives but would automatically remove its respondent data within the hour
    b. Allow as crawler/bot: allows the IP address to crawl your pages without adding to your capacity

    Note: This IP address would not be able to “click” any of the links or trigger any advanced rules in your creative

    c. Block with a 403 (Forbidden) response
    d. Block with a 404 (Not Found) response

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Removing suspicious clicks

IP restrictions are a great way to set the ion platform up to automatically ignore, block or remove suspicious clicks from your console, however, you will also want to periodically delete any respondents who have not had IP restrictions set up. To delete suspicious clicks from your console, please follow the below steps:

To begin, hover over Settings tab and select 'Manage Capacity' where you have two options to delete suspicious clicks:

1. Delete suspicious clicks

    a. At the bottom of the page, you will see a section labeled 'delete suspicious clicks'

    b. Click the red delete button and ion will find all suspicious clicks who have returned to your console five or more times and will also take you to a confirmation page

    c. The confirmation page will display how many respondents are about to be removed and will also have a link that can be clicked to download a report of the respondents you are about to delete

    d. Simply click 'confirm delete' to remove these respondents from your console

2. Delete respondent by domain or IP

    a. Open your suspicious clicks report

    b. Sort the IP address column to show unique records only

    c. Copy up to 50 IP addresses

    d. Paste into the 'IP address(es)' section in your 'Manage Capacity' screen

    e. Click delete

    f. Click orange link to download Excel spreadsheet containing respondent data you are about to delete

    g. Confirm delete

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Conclusion

Need a helping hand with your creatives? No problem! You can always call or email your dedicated account manager for support. ion also has you covered with a comprehensive support site in addition to our awesome customer service.

You can click the support tab in your console to be taken to our support site where you will find well organized support documentation, training videos, product announcements and more to help make sure you are well taken care of!

TIP — You can also open a support ticket by sending your request to help@ioninteractive.com

If you have a really technical question, you can also file a ticket by clicking the green plus sign in the top right corner of our support site. When you do, your dedicated account manager will receive an email and immediately spring to action!

Your dedicated account manager is also always an email or phone call away so please feel free to reach out.

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Glossary

ion Terms

Campaign:

Folder in the ion platform where creatives are housed - immediately below the portfolio level.

Creative:

Compilation of ion pages that make up your landing experience – immediately below the campaign level.

Global Library:

Central location where content is stored and managed (i.e. images, scripts, fulfillment items, etc.)

Master Page:

Template-based layout used to build creatives.

Peek Email:

Email sent to ion user (as specified) containing the data posted by ion and response from the web form's server.

Portfolio:

Folders that organize your ion campaigns – (highest level of organizational structure).

Raw Data File:

Global or campaign-level export that includes form data and ion core fields.

Respondent Funnel:

Graphical representation of total, segmented, and converted respondents available at every level of reporting.

Source & Creative Drilldown:

Breakdown of respondents, segmentation, and conversion rates by portfolio, campaign, traffic source and creative.

Suspicious Clicks:

Report with a list of IP addresses that may not be desired respondents.

Theme Comp:

Mockup of theme to be approved by client before installing in your ion console.

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Testing/Reporting

A/B Test:

Test involving multiple pages in an effort to find the most successful creative.

Bounce Rate:

Percentage of visitors to your page who do not click a tagged, actionable item before abandoning (opposite of segmentation).

Bubble Chart:

Visual representation of traffic flowing through your ion pages – the larger the bubble, the more traffic being driven through a given creative. The higher the bubble is, the more conversions and the further to right, the higher the segmentation rate.

Capacity:

Total number of unique respondents that can be stored in your ion console.

Confidence:

Level at which the ion platform declares a "winner" of a given test by removing the lesser performing creatives (for split tests) or combinations (for MVT tests) out of rotation – typically between 85-99%.

Conversion:

Visitors who complete the most important action in your ion landing experience. The conversion event is defined by you. Typically, for lead generation, a form submission is labeled "mark respondent as converted".

MVT (Multi-Variate Test):

Page-level experiment that enables respondents to create and test variations of page-elements. The ion platform serves up combinations of these variations to reach a winning combination.

Respondents:

Unique visitors to your ion landing experience.

Segmentation:

The first tagged action visitors make in your ion experience (opposite of bounce rate).

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Setup/Page Creation

3rd Party Script:

JavaScript from a vendor outside of the ion platform typically used for tracking purposes.

Above the fold:

Content that is seen without scrolling down the page - also referred to as above the scroll.

Asset:

Creative images (i.e. logos) that can be incorporated into the ion platform.

Conversion Path:

Landing experience that segments visitors to serve them up with a targeted offer page.

Deep Links:

Web address of internal pages within your creative aside from the initial landing page. Typically used to drive traffic to targeted pages within a microsite.

Fulfillment:

Item that respondents receive after taking a desired action in your creative.

Landing Page:

A single web page that promotes your company and/or product with a focus on conversion.

Meta Tags:

Element that provides metadata about your landing page to search engines (i.e. title at the top of browser window).

Microsite:

Multi-page landing experience with tabs used for navigation.

Optimization:

Process by which the ion platform tests and determines which elements of your landing experience are most effective.

Pay Per Click (PPC):

Internet advertising model used to direct traffic to landing pages or websites, where advertisers pay the hosting service (i.e. Google, Bing, Yahoo, etc.) when the ad is clicked.

Post-Click Marketing:

Practice that aims at improving sales and marketing results by focusing on website visitors when they respond to online marketing activities (i.e. PPC, Email, etc.) with the objective on increasing conversion rates.

Sandbox:

Testing area created within the ion platform where concepts can be tried before pushed live.

Scriptlet:

A piece of custom Java code embedded in HTML-like JavaServer Pages (everything inside the <%@ @%> tags).

Search Engine Optimization (SEO):

Process of improving the organic visibility of your landing pages or site.

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Subdomain:

Unique domain name within another domain used to distinguish a particular department, function, or service.

Tag:

Unique label given to an actionable element within the ion platform utilized to report clicks/conversions at a given point in the ion landing experience.

Theme:

Overall look and feel for your ion landing experiences.

Traffic Source:

URL that controls/directs live traffic to your ion landing experience.

Widget:

Portable code that can add interactive design elements and interactive tools to your ion pages (i.e. Twitter feed, Facebook like button, calendar, etc.)

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Data Collection

Choice Set:

Grouping of options for use on ion forms that can be displayed as drop-downs, list boxes, radio buttons or checkboxes. Added to ion under Integration > Data Collection, they are comprised of choice names (as displayed on the form) and choice values (that will be saved into the ion database).

Choice Value:

The data associated with a given choice set option and exported into a database.

Data Field:

Designation of information to be collected on an ion form.

Delimited File:

Excel-ready (.csv) file that is sent directly to your email address with respondent data.

Export:

The transference of respondent data from the ion platform to a receiver outside of the ion platform (i.e. Salesforce, email address, web form, etc.)

Export Format:

Collection of data fields that will be exported.

Form URL:

The web address (URL) to which respondent data is sent via web form post.

Formatted Email:

Email export with defined data fields and subject line that can be delivered immediately or at a scheduled time.

File Transfer Protocol (FTP):

Standard network protocol used to transfer files from one host to another over the Internet – allows data to be sent to a web form where it will be available for download.

Query String Variable:

Data appended to a URL to pass to web applications such as ion – variables are query string parameters' values.

User Agent String:

Part of a query string that identifies what web browser a respondent used while viewing your ion landing experience.

Web Form Post:

Export that transfers respondent data to a web form outside of the ion platform.

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